



COMPLIANCE USER GUIDE

SAFETY, QUALITY & COMMISSIONING

INEIGHT 

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EXERCISES



INEIGHT COMPLIANCE OVERVIEW

Lesson Duration: 30 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the purpose of Compliance
- Explain the workflow of Compliance

Topics in this Lesson

1.1 Compliance Overview	16
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1.1 COMPLIANCE OVERVIEW

Scenario

As a Quality Manager, you notice a lot of deficiencies on a certain mix of concrete. The Quality Inspector tells you that the concrete tests have been failing and he has been noting them on his paper inspections for the past 5 pours.

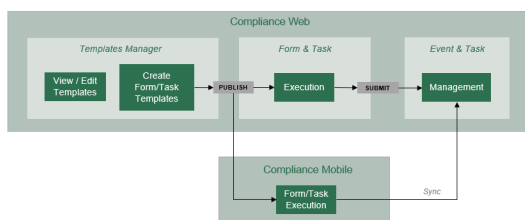
Had these inspections been logged into an electronic system, notices could be automatically generated and reported out so that changes in the mix design could have been made and deficiencies could have been avoided.

InEight Compliance is an electronic system for managing forms and tasks that allow you to capture data within your organization, send out notifications and use the information in all types of reports and dashboards. This includes:

- Creating and storing form and task templates in the Template manager
- Selecting, filling out, and submitting events and tasks
- Tracking the status of and managing data on the Events and Tasks pages

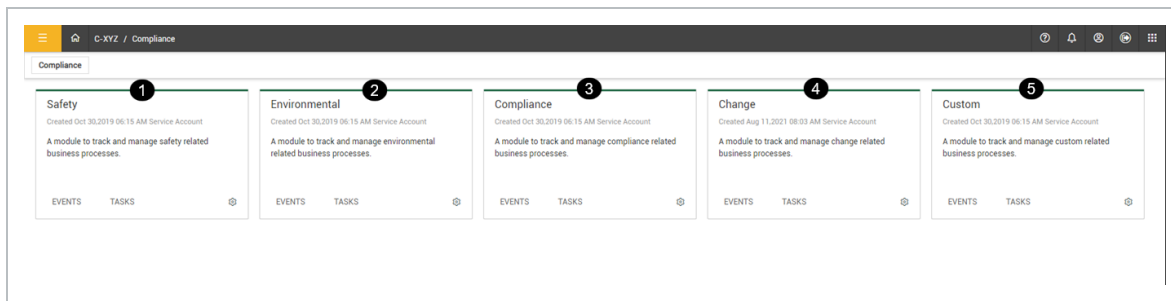
1.1.1 InEight Compliance workflow

From within each of these modules, there is a workflow for creating templates, executing events and tasks, and managing them. The following diagram illustrates how forms and tasks are managed within the InEight Compliance application:



1.1.2 Compliance modules

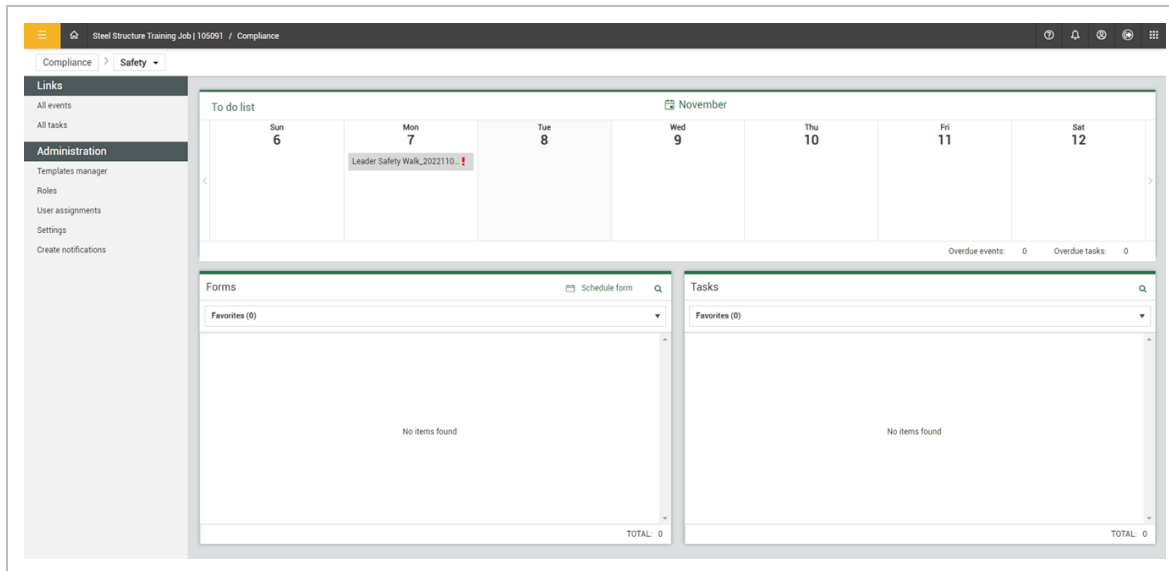
Compliance is organized into the following modules by default.



Overview – Compliance Modules

Section	Module Name	Description
1	Safety	Module within Compliance that contains standard templates for construction safety processes as well as ability to customize any other templates.
2	Environmental	Module within Compliance that contains standard templates for construction environmental processes as well as ability to customize any other templates.
3	Compliance	Module within Compliance that contains standard templates for construction compliance processes as well as ability to customize any other templates.
4	Change	Module to track and manage templates for integration with InEight Change.
5	Custom	Module to track and manage custom related business processes.

Specific to the module you selected, the Module landing page is the working page where you can view or click on both events and tasks lists or access Administration functions. Depending on your role, you might have the job of creating new events or tasks, which you can also do from the Module landing page, if you have the correct permissions.



1.1.3 Templates manager

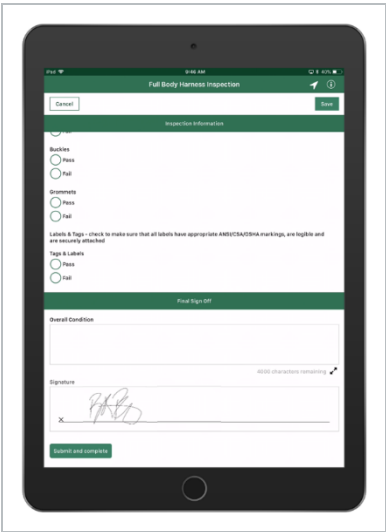
Within each Compliance module, you can access the Templates Manager to manage the templates for the module you are in (i.e., the Templates Manager for the Safety module contains safety-related templates).

Within the Templates Manager you can view the templates already created, along with their status (published, draft, or inactive). You can also create new templates using the Form Builder or Task Builder. The creation of form or task templates is an administrative function performed using the web-based Compliance application.

1.1.4 Form & Task execution

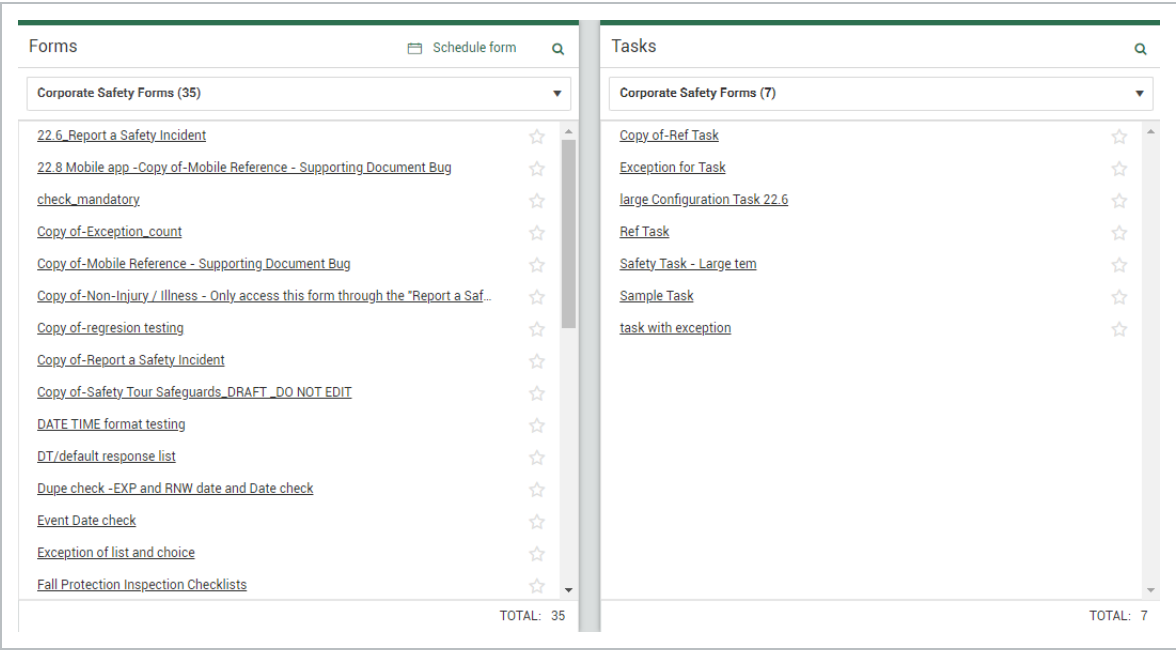
1.1.4.1 Mobile application

In the field, users can fill out and submit inspections, forms and questionnaires, and tasks using the Compliance Mobile application. You can complete the relevant event or task offline using the mobile app and synchronize the results when connected to a network. Additional information will be reviewed in "6.2 Filling out an Event or Task - Mobile" on page 219.



1.1.4.2 Web forms and tasks

There might be times when a user needs to fill out a form or task via the web application. From one of the modules , you can select and launch the form or task you need using the Forms or Tasks dialog boxes.



1.1.4.3 Form and task builders

Compliance has both an intuitive Form builder and Task builder that allows the desired level of complexity to be built into your forms/tasks. It yields numerous question types to collect the information you need from the field and provides functional-level permissions with customizable workflows for each form/task.

1.1.5 All Events and All Tasks

Once forms are submitted, you can track forms as events on the Events page of the web-based Compliance application. There is an Events page within each Compliance module, where you can track the status of your event in the approval process (e.g. Pending, With Claims Manager, Complete). Due dates shown in red indicate the event form is overdue.

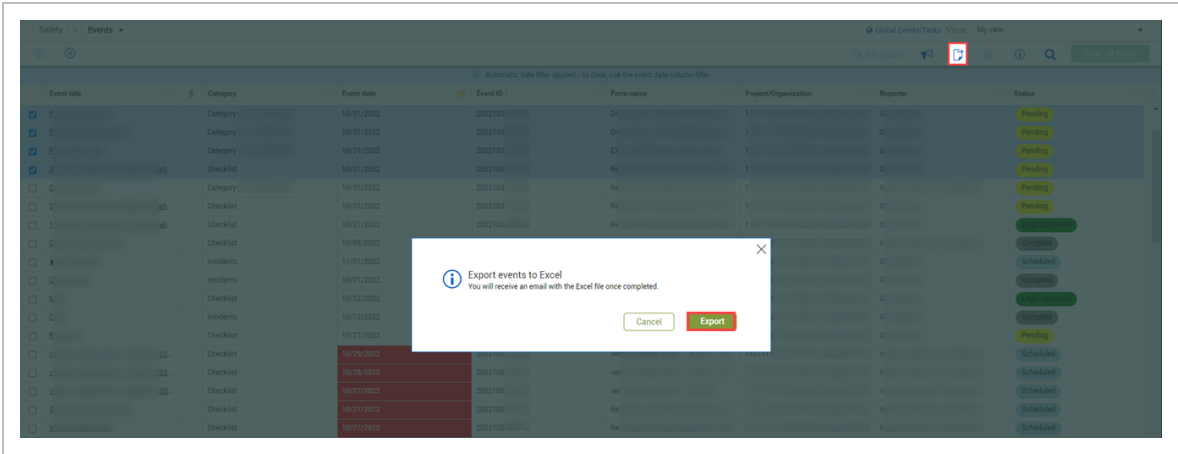
Event title	Category	Event date	Event ID	Form name	Project/Organization	Reporter	Status
Copy of 3c	Category A - DO NOT EDIT	10/31/2022	20221031		(R1 HQ Platform Replacement)		Pending
20copy of C	Checklist	10/31/2022	20221031		(R1 HQ Platform Replacement)		Pending
1031Copy	Checklist	10/31/2022	20221031		(R1 HQ Platform Replacement)		Complete
Check exp	Checklist	10/06/2022	20221031		(R1 HQ Platform Replacement)		Complete
Child 2	Incidents	11/01/2022	20221031		(R1 HQ Platform Replacement)		Scheduled
Child of cor	Incidents	10/31/2022	20221031		(R1 HQ Platform Replacement)		Complete
M2w	Checklist	10/12/2022	20221029		(R1 HQ Platform Replacement)		Complete
Child	Incidents	10/12/2022	20221029		(R1 HQ Platform Replacement)		Complete
Ref check	Checklist	10/27/2022	20221027		(R1 HQ Platform Replacement)		Pending
version use	Checklist	10/26/2022	20221027		(R1 HQ Platform Replacement)		Scheduled
version use	Checklist	10/26/2022	20221027		(R1 HQ Platform Replacement)		Scheduled
version use	Checklist	10/27/2022	20221027		(R1 HQ Platform Replacement)		Scheduled
Sign and of	Checklist	10/27/2022	20221027		(R1 HQ Platform Replacement)		Scheduled

Once tasks are submitted, they can be tracked on the Tasks page of the web-based Compliance application. There is a Tasks page within each Compliance module, where you can track the status of your task, shown as Submitted. Due dates shown in red indicate the task is overdue.

Task title	Category	Due date	Project/Organization	Responsible party	Status	Task ID	Task name
	Quality Issue	10/31/2022	11C	G	Scheduled	20221031/10/31/2022	
1	Quality Issue	10/31/2022	11C	G	Scheduled	20221031	
2	Quality Issue	10/31/2022	11C	G	Scheduled	20221031	
	Checklist	11/02/2022	11C	G	Scheduled	20221031	
	Checklist	11/01/2022	11C	G	Scheduled	20221031	
	Checklist	10/31/2022	11C	G	Scheduled	20221031	
sk ALL	Checklist	11/03/2022	11C	G	Scheduled	20221031	
sk ALL	Checklist	11/02/2022	11C	G	Scheduled	20221031	
sk ALL	Checklist	11/01/2022	11C	G	Scheduled	20221031	
sk ALL	Checklist	10/31/2022	11C	G	Scheduled	20221031	
	Checklist	10/31/2022	11C	G	Scheduled	20221031	
	Quality Issue	10/31/2022	11C	G	Scheduled	20221031	
1	Quality Issue	10/31/2022	11C	G	Scheduled	20221031	
2	Quality Issue	10/31/2022	11C	G	Scheduled	20221031	
	Checklist	11/02/2022	11C	G	Scheduled	20221031	

1.1.5.4 Exports

Click on the **Export** icon so that you can export selected items from the All Events page or the All Tasks page. The system will generate a .ZIP file that can be extracted.





GENERAL NAVIGATION

Lesson Duration: 20 minutes

Lesson Objectives

After completing this lesson, you will be able to:

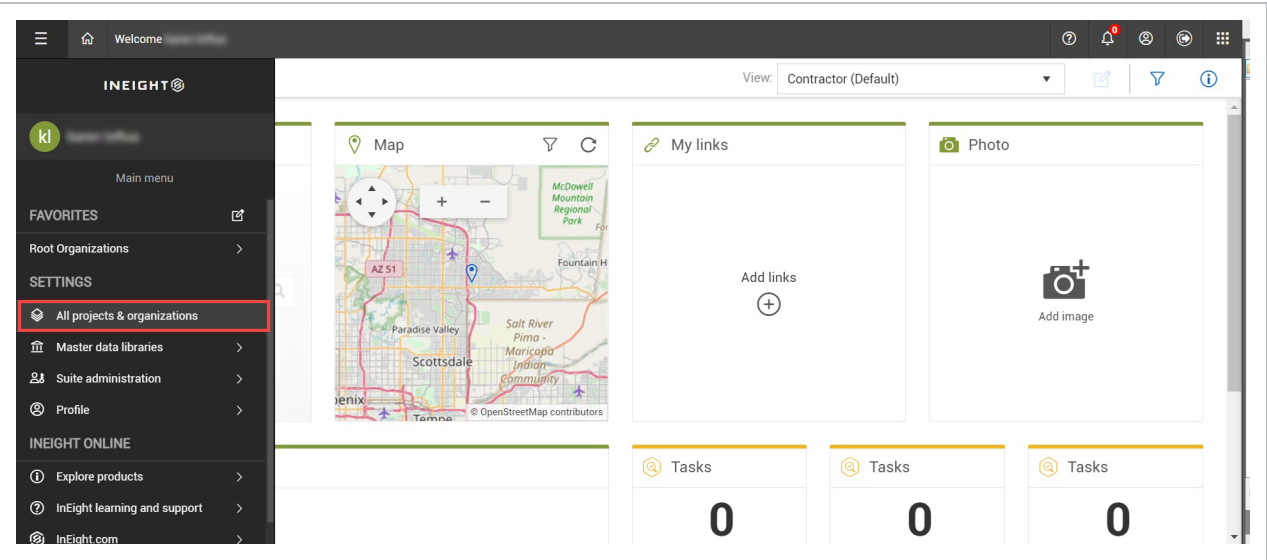
- Launch Compliance
- Access Compliance modules
- Navigate within Module landing pages

Topics in this Lesson

2.1 Compliance Launch	24
2.2 Compliance Landing Page	26
2.3 Module Landing Page	27

2.1 COMPLIANCE LAUNCH

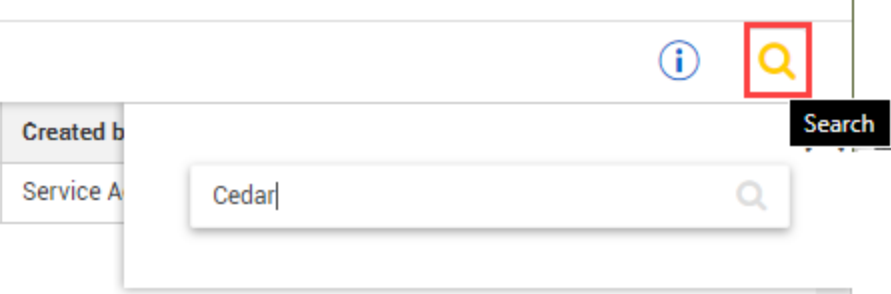
To open a project in Compliance, use the link provided to you by your manager or other source. Click the **Main menu** icon at the top left, and then select **All projects & organizations**.



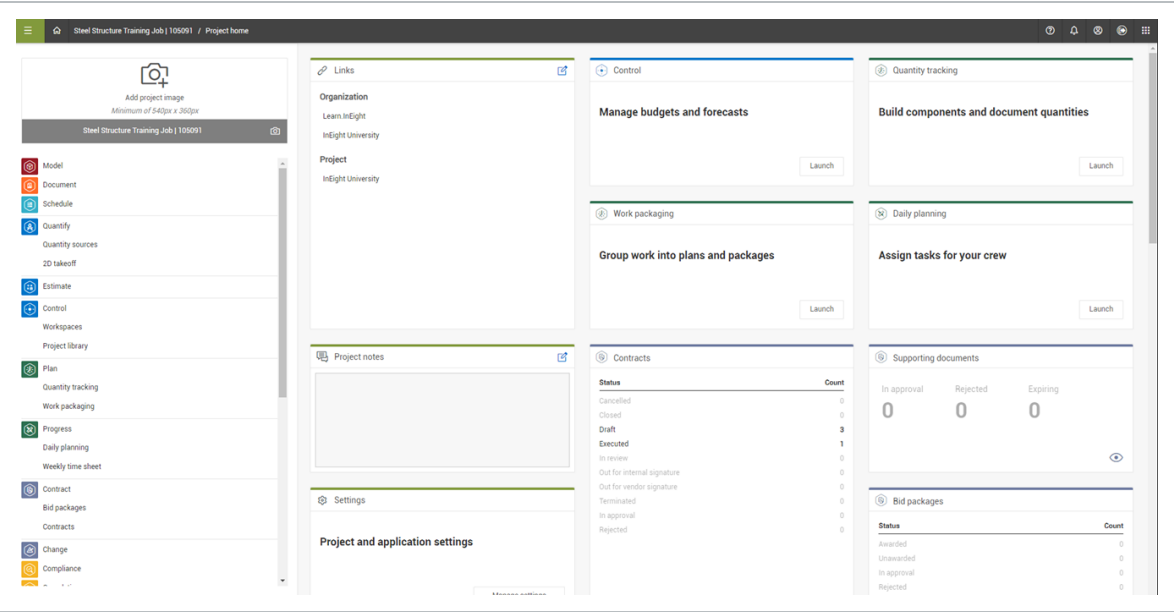
Click the **Name** hyperlink to open the project. You can use the Search function at the top right to find a specific project.

A screenshot of the 'All projects & organizations' table in the InEight software interface. The table has columns for ID, Name, Stat., Organization, Created by, Created on, Original contract, Contract number, and Date project start. The table contains multiple rows of project data, with the first row being highlighted. The table is titled 'PROJECTS' and 'ORGANIZATIONS' at the top. There is a search icon at the top right of the table.

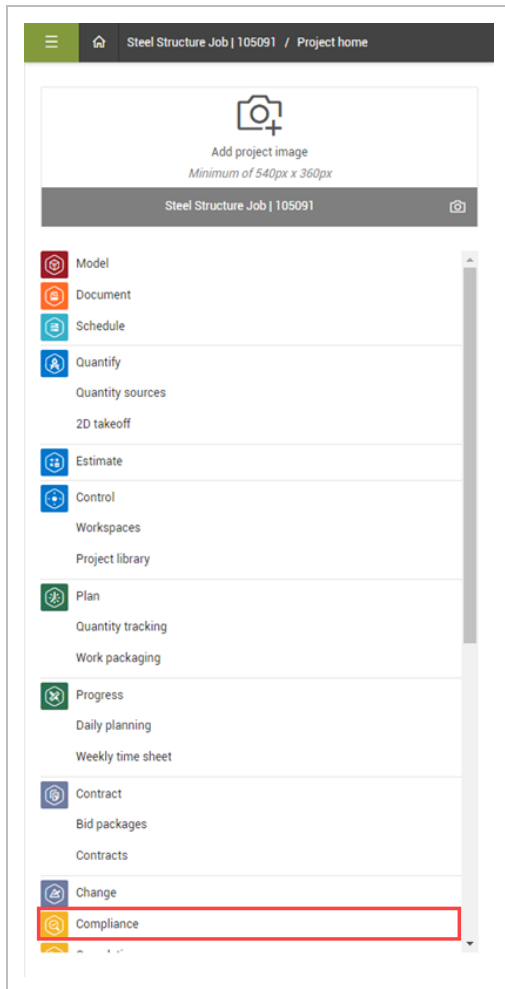
If your project is not displayed, you can search by selecting the **Search** icon in the top right corner. This search function will search all terms in all columns.



The Project home page opens.



Click Compliance on the left navigation menu.



The Compliance landing page opens.

NOTE

In the Projects home landing page you can launch Compliance in other ways not mentioned here.

2.2 COMPLIANCE LANDING PAGE

The Compliance landing page is the home page for Compliance. It is the starting point from which you can access any of the Compliance-related modules to track and manage forms.

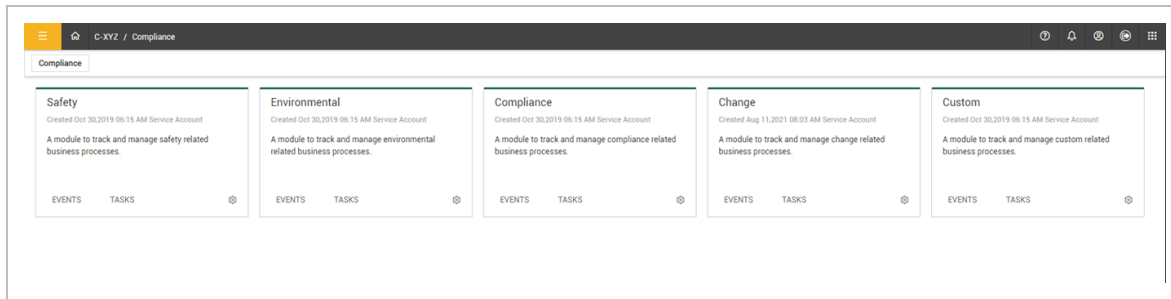
The landing page contains the following modules by default:

- Safety
- Environmental
- Compliance

- Change
- Custom

When you click on a tile, it opens to that module's corresponding landing page, where you can access and manage the forms or tasks related to that category.

The modules shown on the Compliance landing page depend on your assigned permissions for the selected project. You can only see the modules you have access to.



2.3 MODULE LANDING PAGE

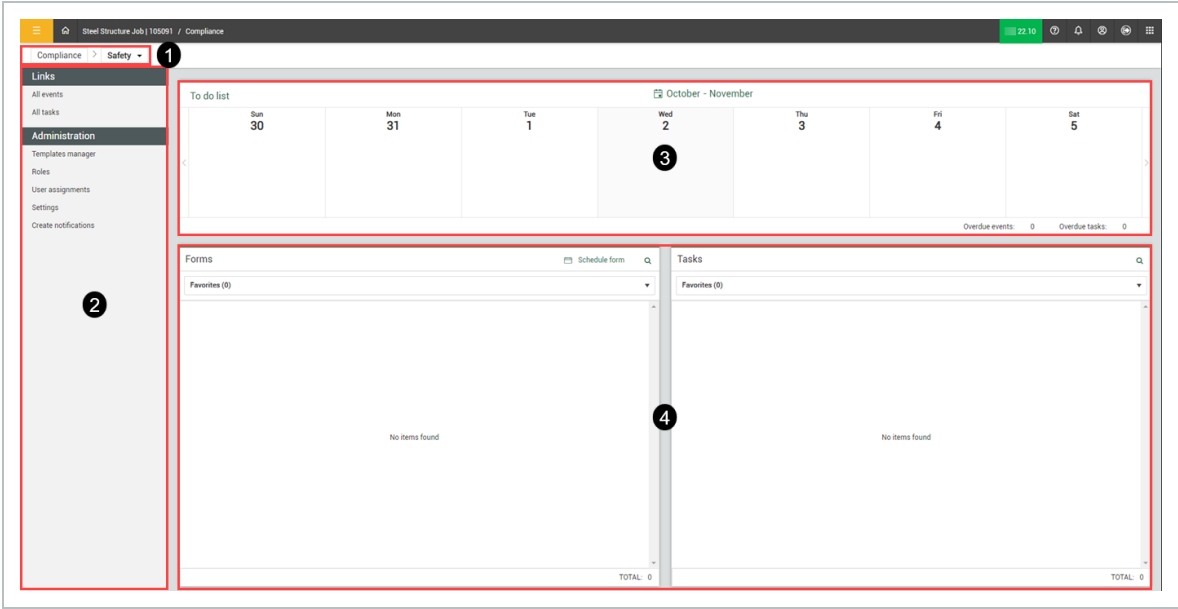
The Module landing page is the working page where you can look up and fill out forms or tasks related to the module you selected (e.g., Safety, Environmental, etc.). Depending on your role, you may have the job of creating new forms or tasks, which you can also do from the Module landing page, if you have the correct permissions. From the Compliance landing page, assume you select the Safety module tile. This takes you to the Safety Module landing page.

Overview – Module Landing Page

	Title	Description
1	Module navigation	Move from the current module landing page back to the Compliance landing page.
2	Left navigation menu	From this menu you can access all events (filled out forms) or tasks for the module you are in and view their status. If you have Administrator settings, you can perform additional functions by selecting any of the following Administration options: • Templates Manager - library of all forms/tasks in your organization, where you can manage blank forms/tasks and build new ones • Roles - Manage roles and permissions for Compliance • User Assignments - Assign users to organizations/projects,

Overview – Module Landing Page (continued)

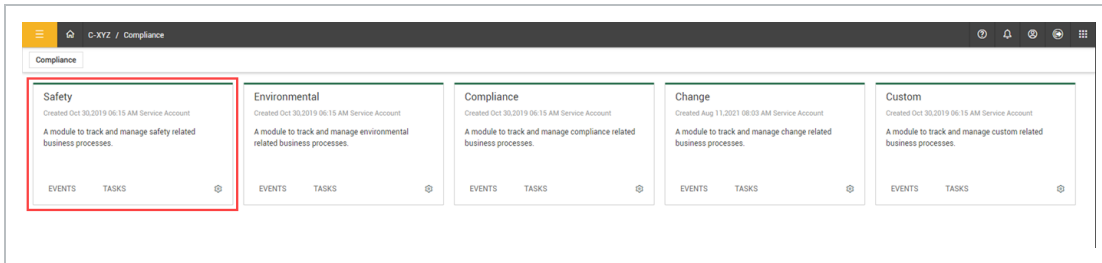
	Title	Description
		categories and roles • Settings - Edit modules, categories, statuses, roles, email templates, and user assignments • Create Notifications - Send email to users or roles with a personalized notification
3	To do list	A week’s view of your current assigned and pending tasks and scheduled or pending events.
4	Forms or Tasks	To fill out a form/task, select the appropriate category from the Forms or Tasks drop down list, or search for it by its title. You can then select the form or task to fill it out. You can also schedule a form for a specific date by using the button in the top right corner of the Forms box.



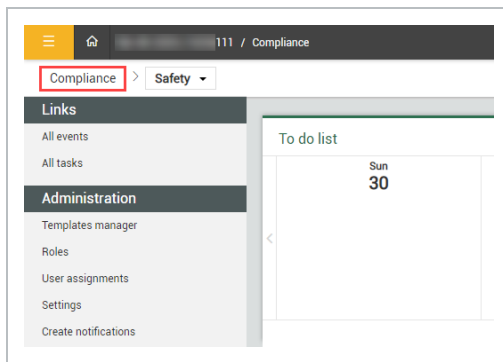
The following Step by Step walks you through navigation of the Module landing page. It assumes you have privileges to access the Administration settings.

2.3 Step by Step 1 — Navigate Module Landing Page

1. From the Compliance project landing page, select the **Safety** module tile.



- The Safety Module landing page shows.
2. Click the **Compliance** button in the upper left of the page to go back to the Compliance landing page.



3. Click the other module tiles such as **Quality**, to open their landing page.
 4. Click the **Compliance** button to go back to the Compliance landing page.
 5. Click the **Safety** module, and then click on **All events** on the left side bar menu.
- This opens the Events page, where you can see all filled out Safety forms and their status

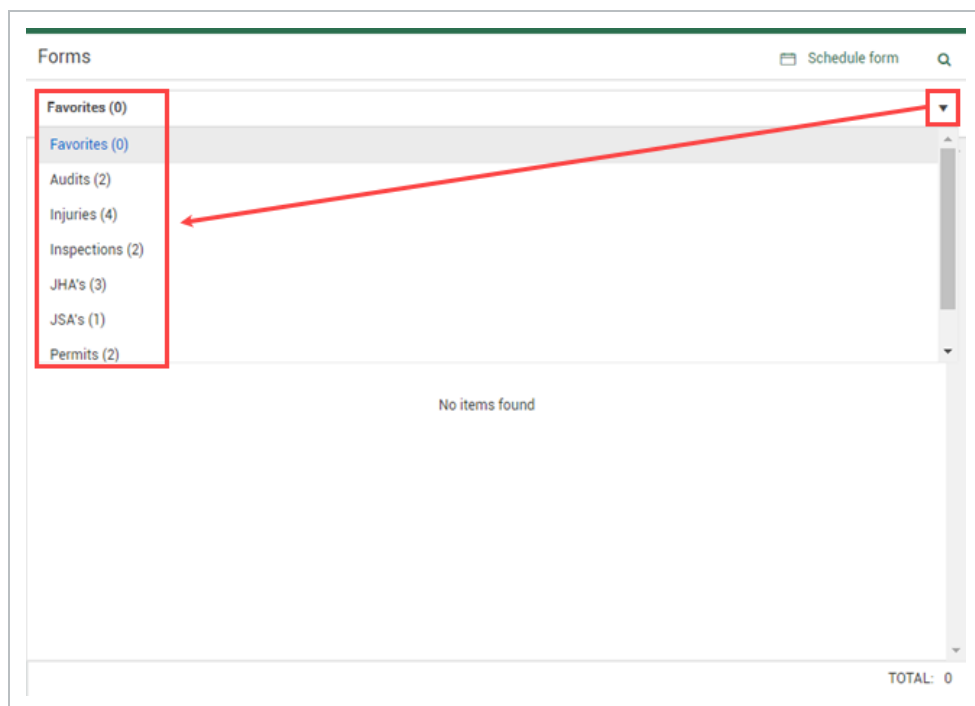
The screenshot shows the 'Safety' module landing page with the 'Events' tab selected. The main area displays a table of events. The table has columns for Event title, Category, Event date, Event ID, Form name, Project/Organization, Reporter, and Status. The table is filtered by 'Automatic date filter applied - to clear, use the event date column filter'. The table shows a list of events with their respective details and status.

Event title	Category	Event date	Event ID	Form name	Project/Organization	Reporter	Status
15a	Checklist	11/01/2022	20221101	Nun			Complete
15b	Checklist	11/02/2022	20221102	Nun			Complete
15c	Checklist	11/03/2022	20221103	Nun			Complete
15d	Checklist	11/04/2022	20221104	Nun			Complete
15e	Checklist	11/05/2022	20221105	Nun			Complete
15f	Checklist	11/06/2022	20221106	Nun			Complete
15g	Checklist	11/07/2022	20221107	Nun			Complete
15h	Checklist	11/08/2022	20221108	Nun			Complete
15i	Checklist	11/09/2022	20221109	Nun			Complete
15j	Checklist	11/10/2022	20221110	Nun			Complete
15k	Checklist	11/11/2022	20221111	Nun			Complete
15l	Checklist	11/12/2022	20221112	Nun			Complete
15m	Checklist	11/13/2022	20221113	Nun			Complete
15n	Checklist	11/14/2022	20221114	Nun			Complete
15o	Checklist	11/15/2022	20221115	Nun			Complete
15p	Checklist	11/16/2022	20221116	Nun			Complete
15q	Checklist	11/17/2022	20221117	Nun			Complete
15r	Checklist	11/18/2022	20221118	Nun			Complete
15s	Checklist	11/19/2022	20221119	Nun			Complete
15t	Checklist	11/20/2022	20221120	Nun			Complete
15u	Checklist	11/21/2022	20221121	Nun			Complete
15v	Checklist	11/22/2022	20221122	Nun			Complete
15w	Checklist	11/23/2022	20221123	Nun			Complete
15x	Checklist	11/24/2022	20221124	Nun			Complete
15y	Checklist	11/25/2022	20221125	Nun			Complete
15z	Checklist	11/26/2022	20221126	Nun			Complete
16a	Checklist	11/27/2022	20221127	Nun			Complete
16b	Checklist	11/28/2022	20221128	Nun			Complete
16c	Checklist	11/29/2022	20221129	Nun			Complete
16d	Checklist	11/30/2022	20221130	Nun			Complete
16e	Checklist	12/01/2022	20221201	Nun			Complete
16f	Checklist	12/02/2022	20221202	Nun			Complete
16g	Checklist	12/03/2022	20221203	Nun			Complete
16h	Checklist	12/04/2022	20221204	Nun			Complete
16i	Checklist	12/05/2022	20221205	Nun			Complete
16j	Checklist	12/06/2022	20221206	Nun			Complete
16k	Checklist	12/07/2022	20221207	Nun			Complete
16l	Checklist	12/08/2022	20221208	Nun			Complete
16m	Checklist	12/09/2022	20221209	Nun			Complete
16n	Checklist	12/10/2022	20221210	Nun			Complete
16o	Checklist	12/11/2022	20221211	Nun			Complete
16p	Checklist	12/12/2022	20221212	Nun			Complete
16q	Checklist	12/13/2022	20221213	Nun			Complete
16r	Checklist	12/14/2022	20221214	Nun			Complete
16s	Checklist	12/15/2022	20221215	Nun			Complete
16t	Checklist	12/16/2022	20221216	Nun			Complete
16u	Checklist	12/17/2022	20221217	Nun			Complete
16v	Checklist	12/18/2022	20221218	Nun			Complete
16w	Checklist	12/19/2022	20221219	Nun			Complete
16x	Checklist	12/20/2022	20221220	Nun			Complete
16y	Checklist	12/21/2022	20221221	Nun			Complete
16z	Checklist	12/22/2022	20221222	Nun			Complete
17a	Checklist	12/23/2022	20221223	Nun			Complete
17b	Checklist	12/24/2022	20221224	Nun			Complete
17c	Checklist	12/25/2022	20221225	Nun			Complete
17d	Checklist	12/26/2022	20221226	Nun			Complete
17e	Checklist	12/27/2022	20221227	Nun			Complete
17f	Checklist	12/28/2022	20221228	Nun			Complete
17g	Checklist	12/29/2022	20221229	Nun			Complete
17h	Checklist	12/30/2022	20221230	Nun			Complete
17i	Checklist	12/31/2022	20221231	Nun			Complete
17j	Checklist	12/31/2022	20221231	Nun			Complete
17k	Checklist	12/31/2022	20221231	Nun			Complete
17l	Checklist	12/31/2022	20221231	Nun			Complete
17m	Checklist	12/31/2022	20221231	Nun			Complete
17n	Checklist	12/31/2022	20221231	Nun			Complete
17o	Checklist	12/31/2022	20221231	Nun			Complete
17p	Checklist	12/31/2022	20221231	Nun			Complete
17q	Checklist	12/31/2022	20221231	Nun			Complete
17r	Checklist	12/31/2022	20221231	Nun			Complete
17s	Checklist	12/31/2022	20221231	Nun			Complete
17t	Checklist	12/31/2022	20221231	Nun			Complete
17u	Checklist	12/31/2022	20221231	Nun			Complete
17v	Checklist	12/31/2022	20221231	Nun			Complete
17w	Checklist	12/31/2022	20221231	Nun			Complete
17x	Checklist	12/31/2022	20221231	Nun			Complete
17y	Checklist	12/31/2022	20221231	Nun			Complete
17z	Checklist	12/31/2022	20221231	Nun			Complete

NOTE

You can select **All tasks** to open the Tabs page showing all the Safety tasks and their statuses.

6. In the Module landing page Forms section, click the **Favorites** drop-down to view the form categories.



7. Select a category form from the Favorites drop-down list.

Forms

Schedule form

Favorites (0)

Favorites (0)

Audits (2)

Injuries (4)

Inspections (2)

JHA's (3)

JSA's (1)

Permits (2)

No items found

TOTAL: 0

8. Select from the forms in the category.

Forms

Schedule form

Inspections (2)

Fall Protection Inspection Checklist

Leader Safety Walk

TOTAL: 2

- The form opens for you to fill out.

Leader Safety Walk

31800

CancelSaveSave & Close

AREA / TASK OBSERVED

ASK / CONSIDER THE FOLLOWING QUESTIONS:

STEP 1: Stop and observe work. Ensure it is safe to enter by asking "Can I enter your workspace?"

STEP 2: Introduce yourself if you are not know to the person. "Hi, I'm _____, the General Manager of _____"

Date & Time

month/day/year Hour:Minute

* People Observed

Select one

* Activity Observed

(250 characters remaining)

Specific Job Task

(250 characters remaining)

Sub-contractors involved?

Yes

No

If yes, which company?

(250 characters remaining)

LEADER SAFETY WALK CHECKLIST

Person Protective Equipment (PPE)

Comments

NOTE

You can follow the same steps for tasks in the Tasks section.

Steel Structure Training Job | 105091 / Compliance

Compliance > Safety

Links

All events

All tasks

Administration

Templates manager

Roles

User assignments

Settings

Create notifications

To do list

Sun 6

Mon 7

Tue 8

Wed 9

Thu 10

Fri 11

Sat 12

Overdue events: 0

Overdue tasks: 0

Forms

Inspections (2)

Fall Protection Inspection Checklist

Leader Safety Walk

TOTAL: 2

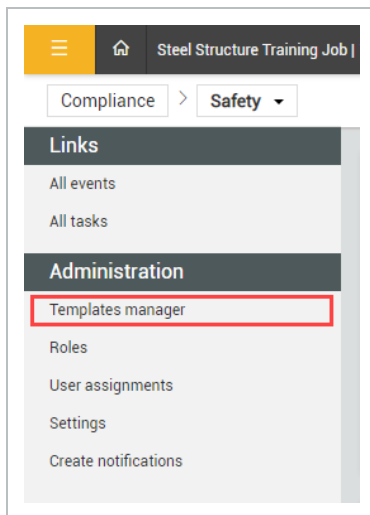
Tasks

Favorites (0)

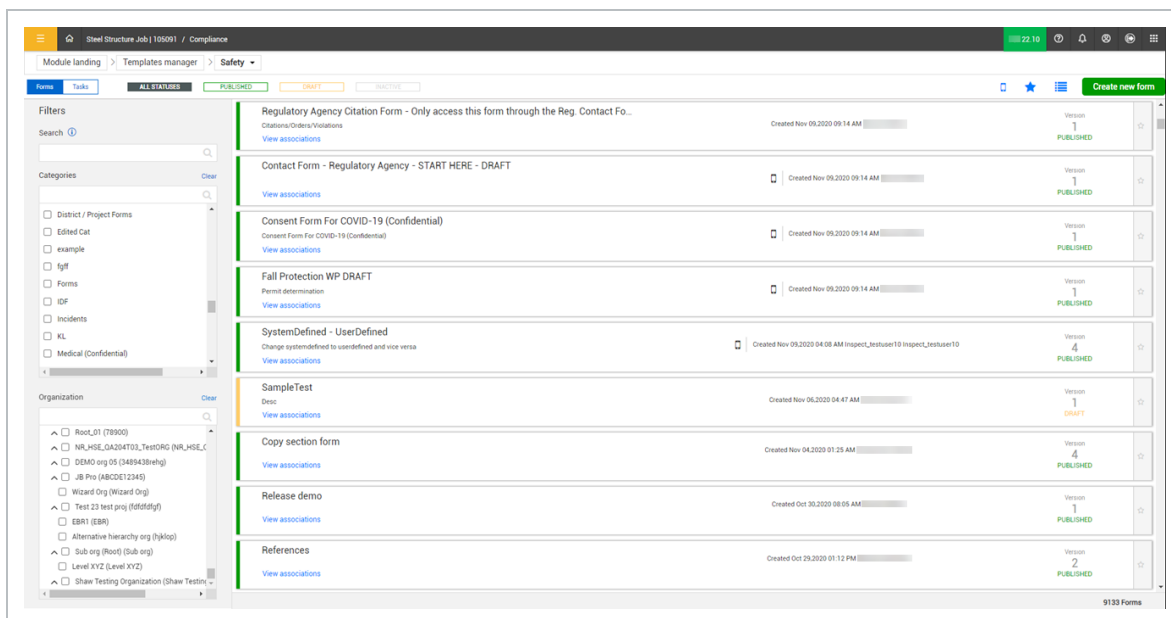
No items found

TOTAL: 0

You can manage and create new forms or tasks for your team or organization in Templates manager. In the module landing page, click **Templates manager** on the side bar menu to open the Templates manager page.



You can create new templates and manage existing ones. You can also filter forms or tasks by Categories or Organization.

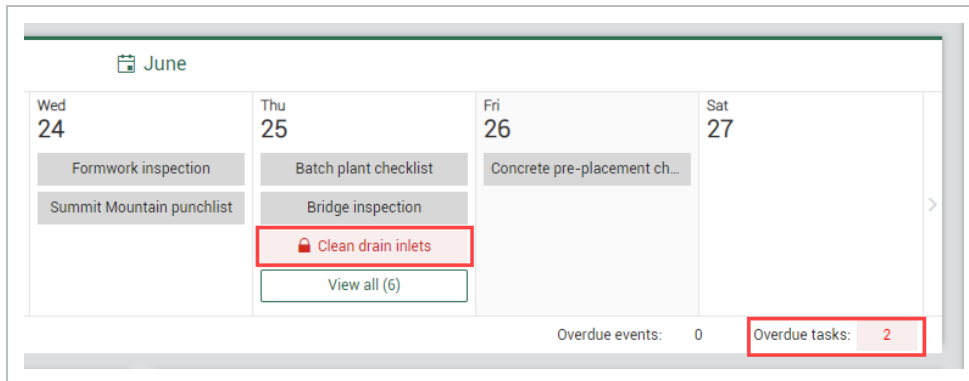


2.3.1 To do list

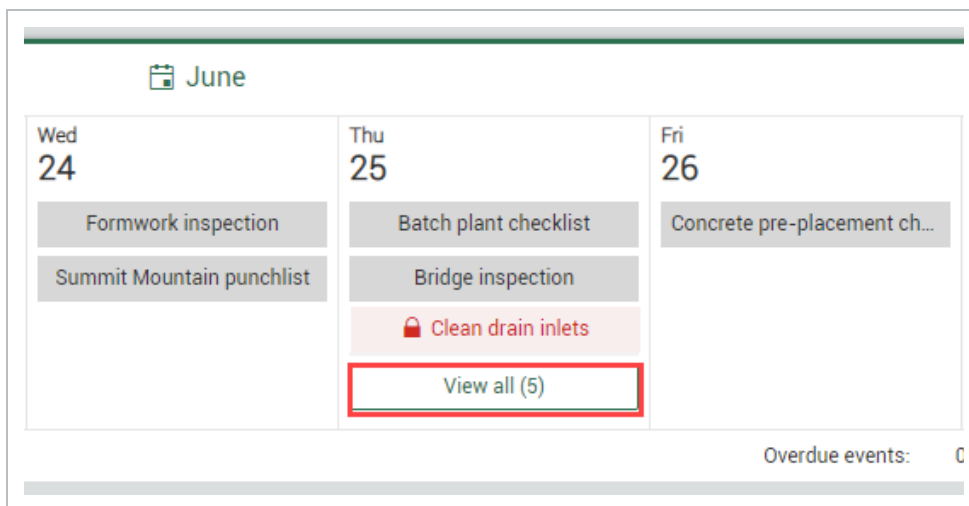
The To do list shows the events and tasks assigned to you that need to be completed in the current week.

You can scroll forward or backward to view events and tasks for other weeks. To scroll, click the arrow icons to the left or right of the window. To go to a specific month, click the month button. Events are shown in dark gray, and tasks are light gray. When events or tasks are overdue, their text color changes

to red. You can see how many overdue events and tasks you currently at the bottom right of the To do list.



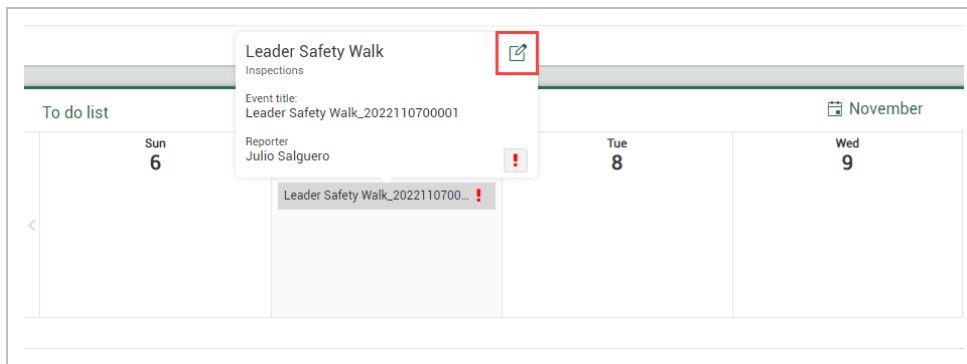
You can click **View all** to see a list of all your assigned items for that day when you have several events or tasks assigned in one day.



The following Step by Step walks you through editing a To do list item:

2.3 Step by Step 2 — Edit a To do list Item

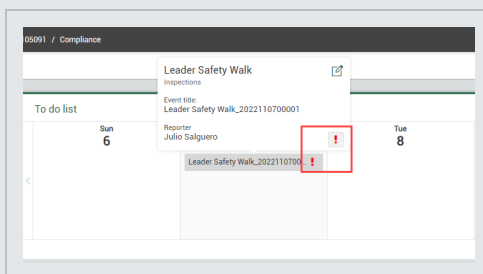
1. In the To do list, click an event or task.
 - A box shows you the item's name and reporter, a High importance icon to mark items of importance, and the Edit icon
2. Click the **Edit** icon.



- The Edit item dialog box opens
3. You can make changes to the following fields, if necessary:
- Event title
 - Reporter
 - Event date
 - Importance

NOTE

When the Importance icon is red, the item is High importance, which is also reflected in the Events or Tasks pages.



Click **Save**.

2.3.2 Schedule a form

You can schedule a form to be filled out for specific event dates. If the event goes beyond the scheduled date, the event state is changed to overdue.

The following Step by Step walks you through scheduling a form from the module landing page.

2.3 Step by Step 3 — Schedule a Form

1. In the Forms box, click **Schedule form** in the top right corner.
 - The Schedule form dialog box opens
2. Fill out the required fields.
3. You can click the **High importance** icon to flag this event as important.
4. You can click **Schedule** to set this event to repeat daily, weekly, monthly, or yearly and fill out the required fields.

NOTE

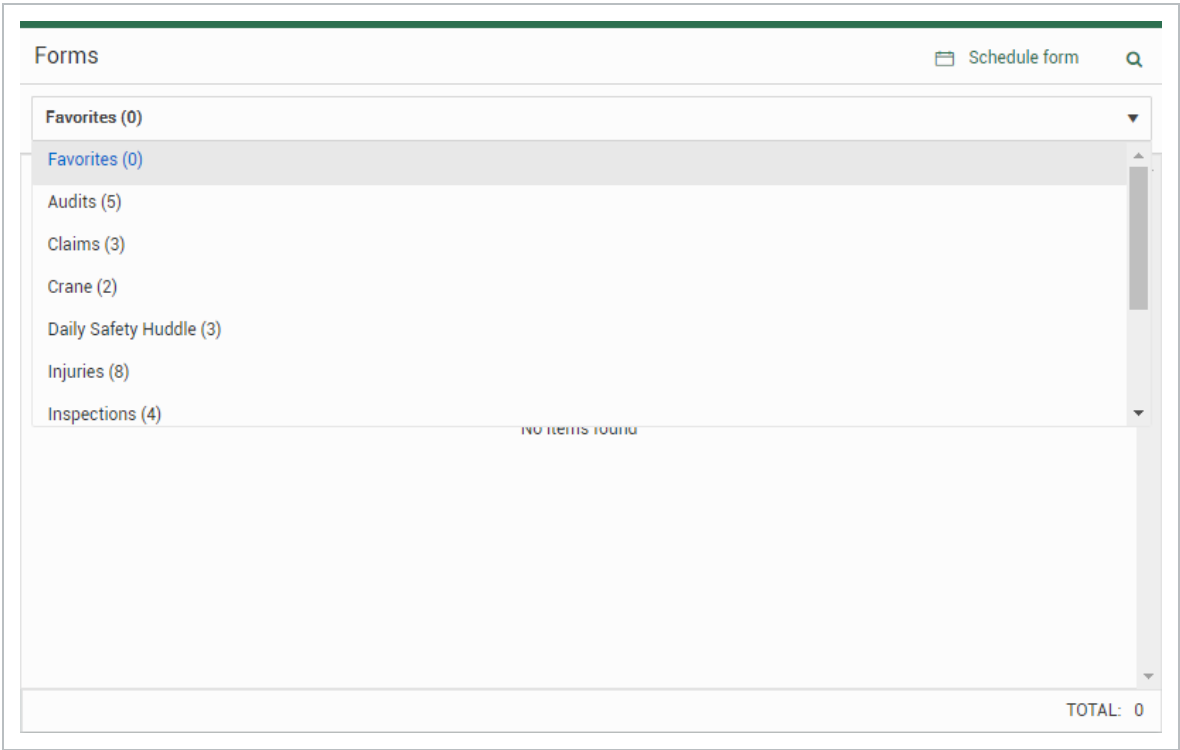
If you select the **Exclude weekends** check box, Saturdays and Sundays are greyed-out and will be excluded, even if you already selected those days.

The screenshot shows the 'Schedule form' dialog box with the following details:

- Form name:** - Select one -
- Category:** - Select one -
- Event title:** [Empty text field]
- Reporter:** - Select one -
- Repeat:** Weekly
- Start date:** 11/07/2022
- Repeat every:** 1 week(s)
- Exclude weekends:** ☒ (highlighted with a red box)
- Repeat on:** [] [] M [] T [] W [] T [] F [] S
- End:**
 - ☐ After 1 occurrence(s)
 - ☐ On 11/07/2022
- Importance:** [Empty dropdown menu]
- Buttons:** Cancel, Save & start new event, Save

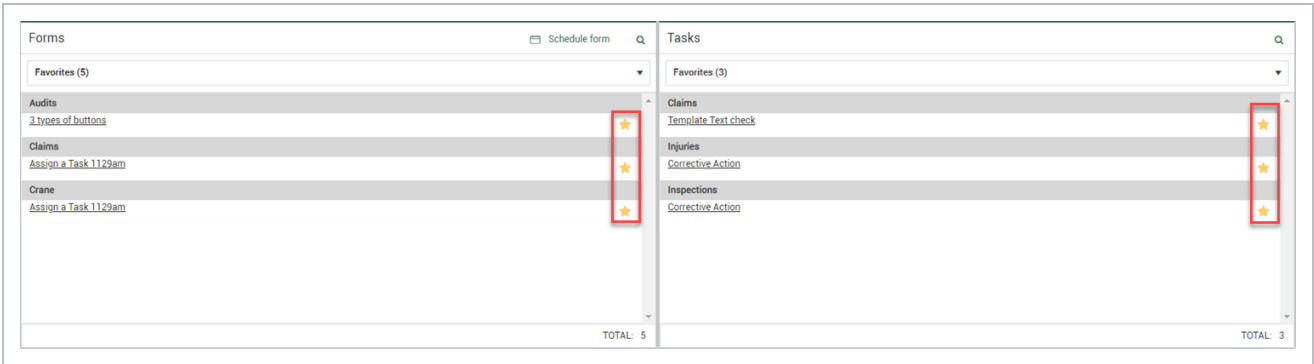
2.3.2.1 Forms categories

In the Module landing page, under Forms, you can select a category for the type of form you need. Only categories that have available templates show in the drop-down menu. The number of templates associated with the category shows next to each category title.



2.3.3 Form and task favorites

When you open the module, the default view for Forms and Tasks is Favorites. In each category, you can add your favorites by selecting the **Favorite** icon next to each category title. When you add forms to your favorites, they show listed in alphabetical order. To remove from your favorites, deselect the Favorite icon.



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COMPLIANCE SETTINGS AND ADMINISTRATION

Lesson Duration: 30 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Navigate the module summary and organizations
- Create and manage categories
- Create and manage classifications
- Create and manage statuses
- Manage standard email templates
- Set up and edit roles and permissions within Compliance
- Manage and set user assignments

Topics in this Lesson

3.1 Settings	41
3.2 Module Summary	44
3.3 Categories	50
3.4 Types	51
3.5 Classifications	52
3.6 Email Templates	54
3.7 Roles	55
3.8 Statuses	72
3.9 User Assignments	74
3.10 User Groups	81

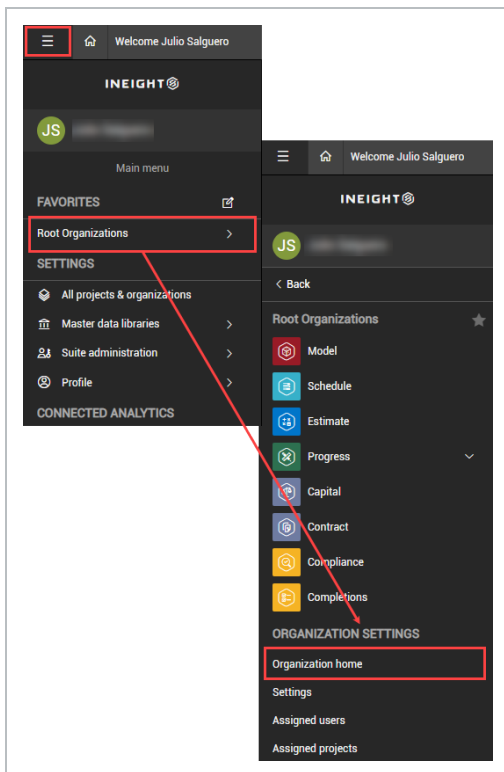
3.11 Product Settings 83

3.1 SETTINGS

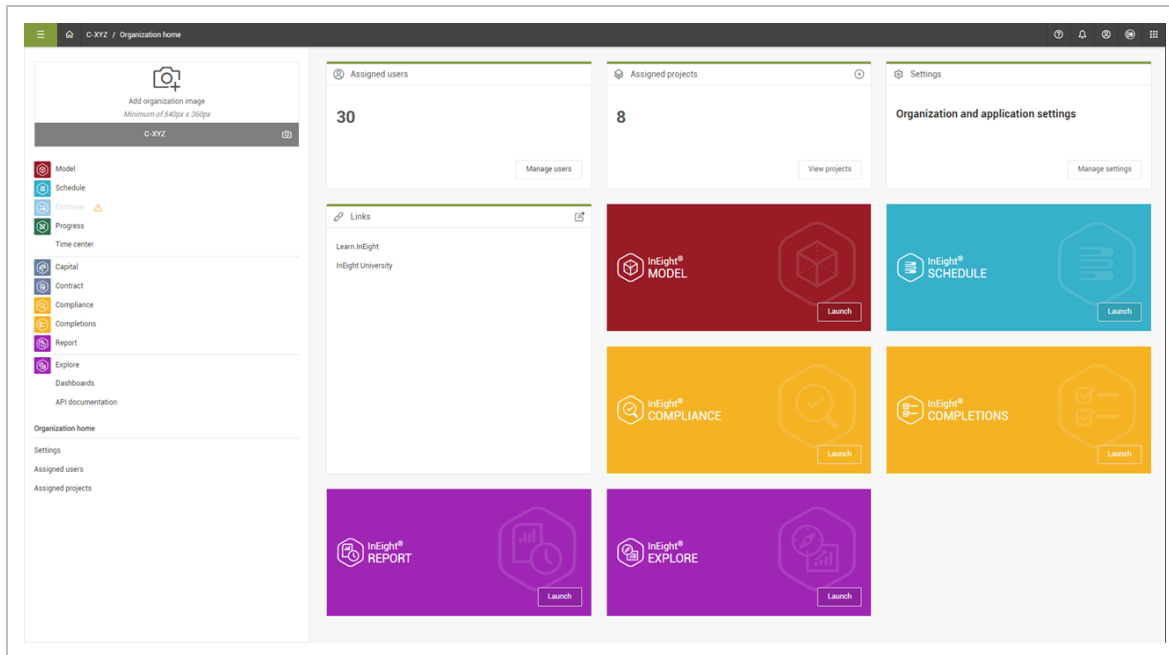
As an administrator, you can setup the correct settings at the organization and project level. This lets you manage and organize the application successfully.

3.1.1 Organization settings

You can access the organization settings from the Organization home page. To access the Organization home page click the **Main menu** -> **Organization** -> **Organization home**.

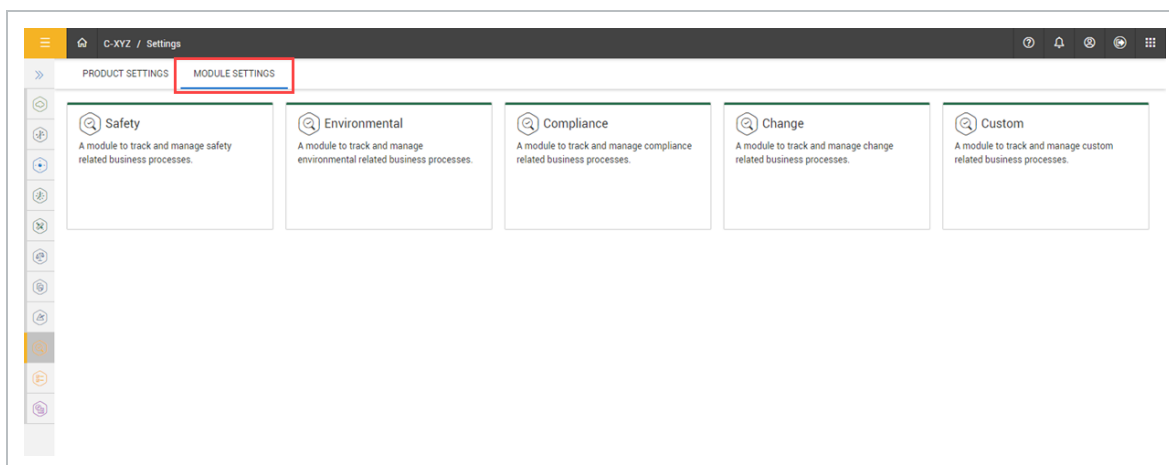


The Organization home page opens.



To navigate to the Settings page, select **Settings**, and then select **Compliance** on the left navigation menu.

When you open Compliance settings, it opens to the Product Settings tab. Select the **Module Settings** tab.



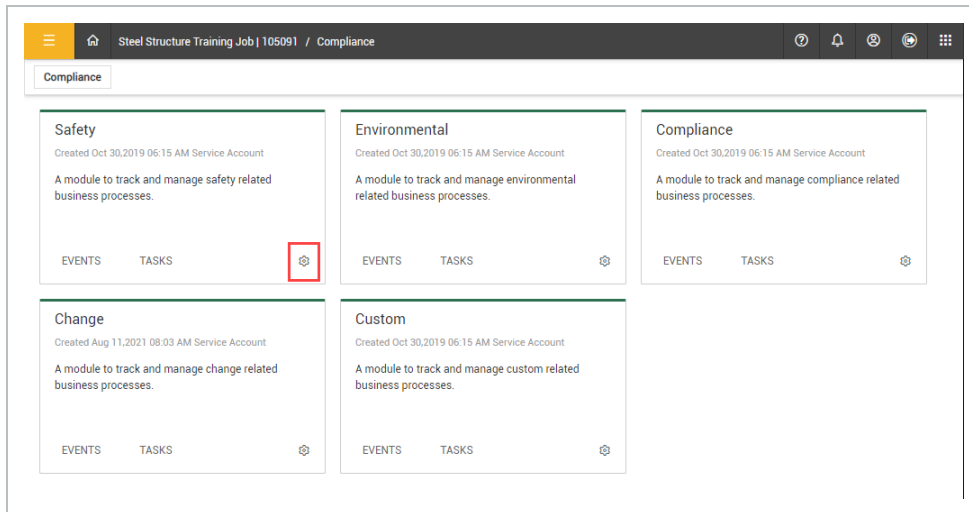
You can click a module tile to configure its settings.

3.1.2 Project Settings

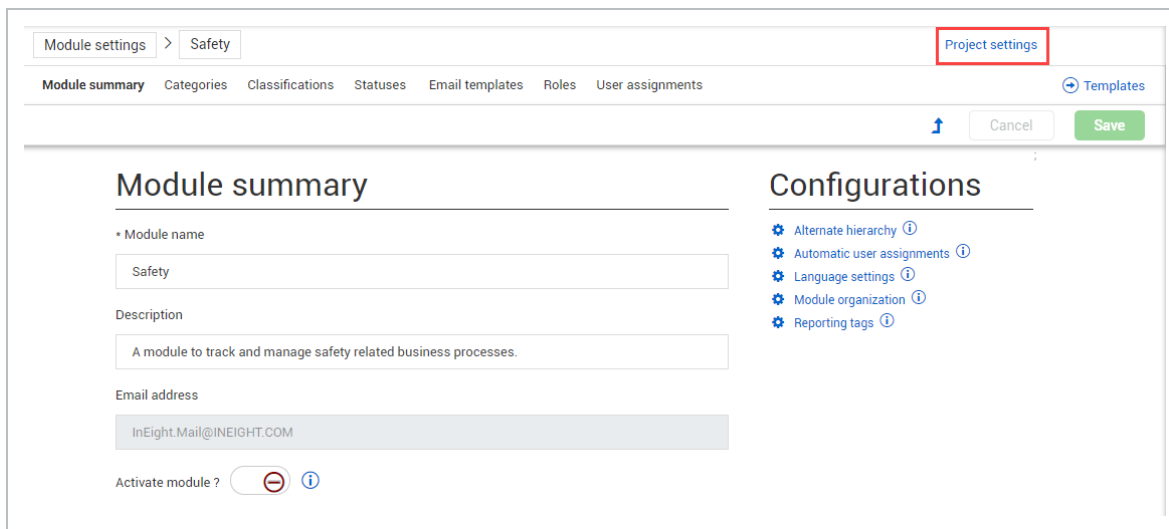
You can create user groups and inspection and test plans for modules at the project level in Project settings.

In the Projects home page, select **Compliance** on the left navigation menu.

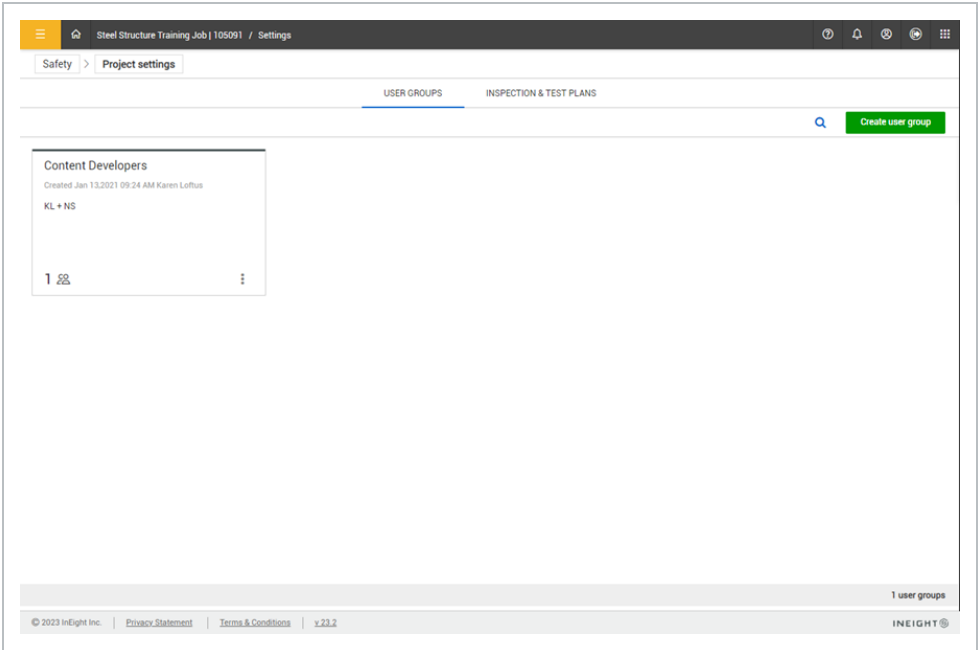
In the module tile, click the **Settings** icon.



The settings page opens. Click **Project settings** on the top right of the page.



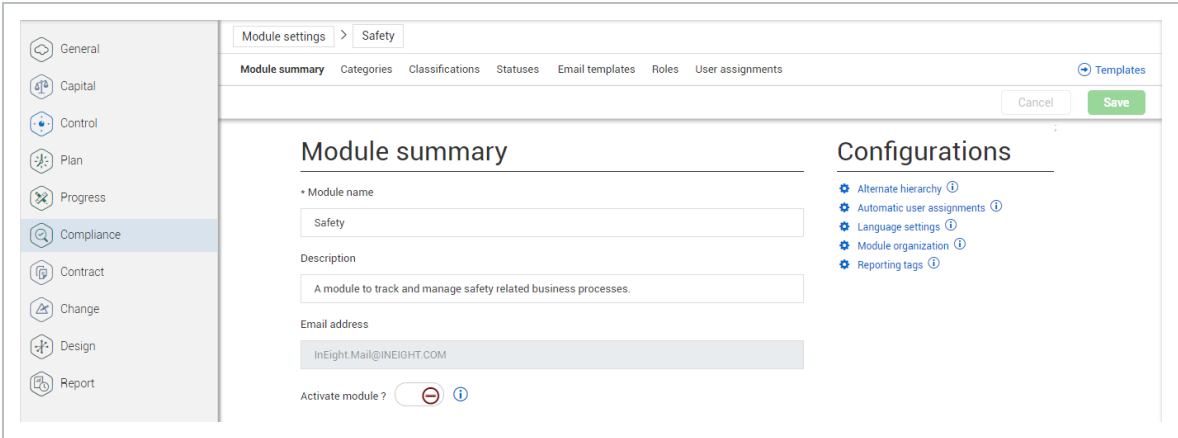
You can then create or configure user group settings.



3.2 MODULE SUMMARY

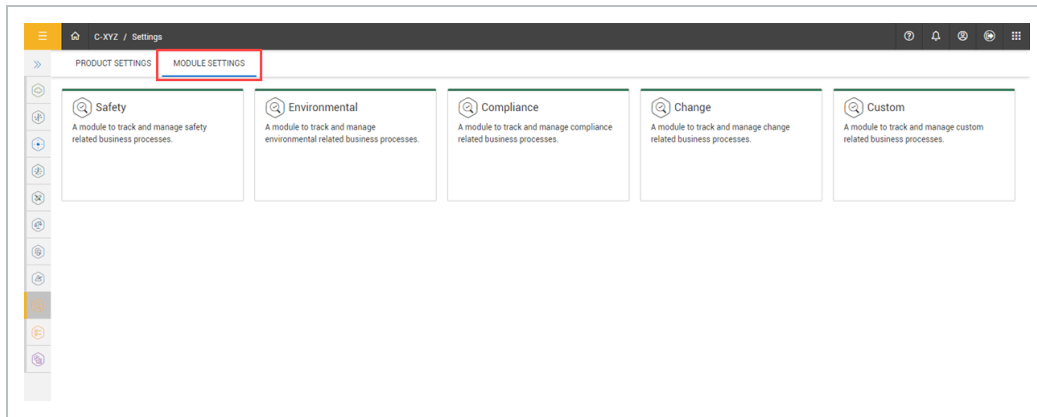
3.2.1 Module Summary

The module summary allows account administrators to view or change the module name and description, set the module to active or inactive, and configure automatic user assignments. The active and inactive choice gives you the ability to turn off the module for the entire InEight product portfolio, per organization or project. Each module is self-contained and does not share information with the other modules. The changes made to a module will be shown throughout the product portfolio, module page, tabs, landing page and mobile device.



3.2 Step by Step 1 — Module Summary Navigation

1. From the Settings page, select **Compliance** from the left panel.
 - The Product Settings page shows. Select the **Module Settings** tab.



2. Select a module.

The Module summary tab opens.

3.2.2 Configurations

To configure additional settings, click the links in the Configurations list. Each configuration shows in a dialog box.

3.2.2.1 Alternate Hierarchy

An alternate hierarchy is separate from the default organization and project hierarchy in the InEight cloud platform. You can set up an alternate hierarchy if you need to share templates and user permissions across projects that do not follow the default hierarchy. For example, if your default hierarchy is organized into legal entities for financial reporting purposes, you can create an alternate hierarchy based on project locations. A project in the Infrastructure division might need to share templates and user permissions with a project in the Energy division because both are in the Western region.

To set up an alternate hierarchy, you must perform the following three general steps:

1. Define hierarchy attributes at the organization level.
2. Associate hierarchy attributes at the project level with other projects or organizations.

3. Extend templates and user permissions between future child projects or organizations via hierarchy attributes in Compliance organization settings.

The following Step by Step details how to define hierarchy attributes at the organization level.

3.2 Step by Step 2 — Define Alternate Hierarchy Attributes

1. At the organization level, go to Settings > General > **Attribute Definitions**.
2. Click the **Add** icon.
 - The Add attribute side panel opens
3. Enter the required fields.

NOTE

For hierarchy purposes, the Data type field is most often set to Text or Data. When the type is set to Data, you must select a Data source of either Organization or Project.

TIP

In the example of a location-based hierarchy, an attribute might be named Region, Data type set to Data, Data source set to Organization, and Category set to Location, which lets you associate organizations with regions.

4. Click **Save**.

The following Step by Step details how to associate hierarchy attributes at the project level.

3.2 Step by Step 3 — Associate Alternate Hierarchy Attributes

1. Open the main menu at the top of any page, and then click **All projects & organizations**.
2. Select the check box to the left of the project you want to use, and then click the **Edit** icon.
3. Open the **Attributes** tab.
 - The Attributes tab opens with each defined attribute organized by category
4. For each attribute that you want to associate, select an organization from its drop-down list or enter a project ID in its field, depending on the attribute's data source.

TIP

In the example of a location-based hierarchy, you might associate an attribute named Region with an organization that represents the Western region. If you set this association in a project in the Infrastructure division of your default hierarchy, you are saying that project is also part of the Western region in an alternate location-based hierarchy.

5. Click **Save**.

The following Step by Step details how to extend templates and user permissions between future child projects or organizations via alternate hierarchy.

NOTE

To view or edit Alternate hierarchy settings, you must have a Level 3 access role.

3.2 Step by Step 4 — Apply Alternate Hierarchy to Compliance Templates and User Permissions

1. At the organization level, go to Settings > **Compliance**.
2. Open a module's **Module summary** tab.
3. Click Alternate hierarchy in the Configurations menu.

The Alternate hierarchy dialog box shows

4. Select attributes from the drop-down lists for template associations and user permissions.

NOTE

Template associations and user permissions are applied to all future child organizations or projects of the attributes you select. If you remove the attributes, the associations themselves are not removed.

TIP

In the example of a location-based hierarchy, if you add the Region attribute to these fields, for projects that are both associated with the Western region, templates and user permissions will be automatically assigned to users in future children of the Western region organization.

3.2.2.2 Automatic User Assignments

The Automatic user assignments configuration lets you save administrative setup time and automatically assign a Compliance role and categories to all users from InEight Platform.

To automatically assign a role, select a role from the drop-down menu.

To automatically assign categories, start typing a category name in the field or click inside the field and select one from the drop-down list.

When you are done assigning roles and categories, click **Save**.

NOTE You must have a Level 3 access role to see and change this configuration.

3.2.2.3 Language Settings

To show translations of a module's user-configurable fields in different languages, select a language from the drop-down list.

To apply translations to a template, use the import function in a template's Properties tab. See [Template Translation](#) for more information.

3.2.2.4 Module Organization

Module organization allows you to exclude any project or organizations from certain or all modules, therefore you will not see the project or organization in the module. This is done by moving the project or organization to the right panel. If you exclude a project, the project cannot be used in user assignments or templates.

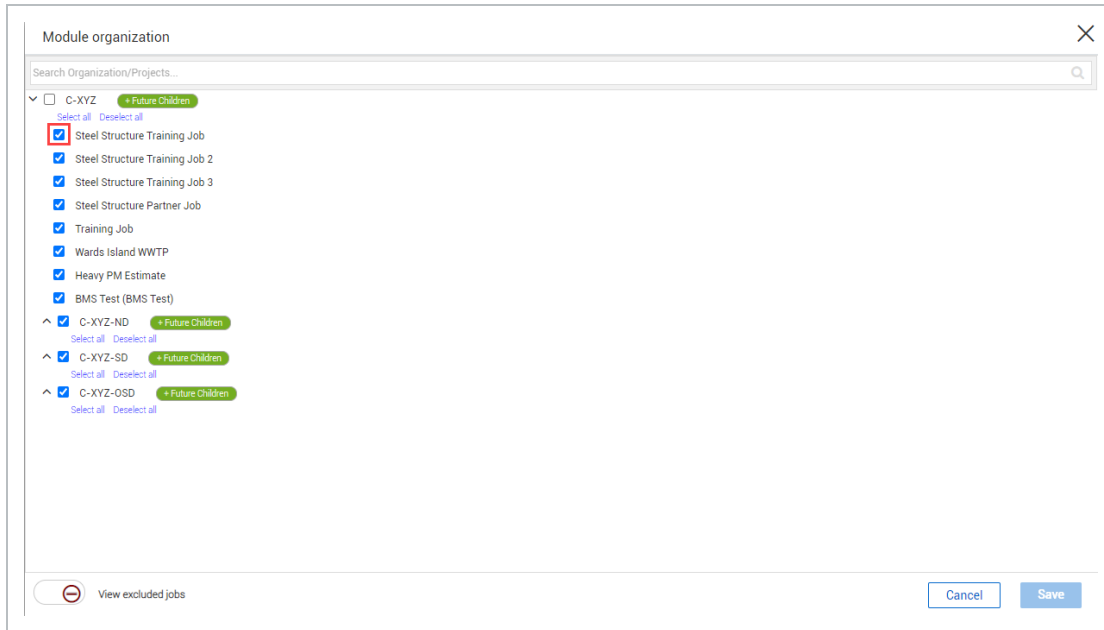
For example, if you are working on a JV project and they are using a different software to keep track of Safety data, you would want to exclude them from the list of projects.

3.2 Step by Step 5 — Module Organization

1. Select **Module organization** from the Configurations menu.

The Module organization dialog box shows

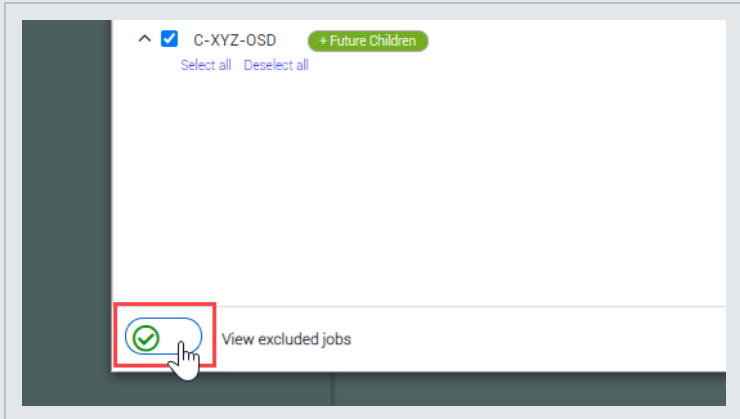
2. Expand an organization level.
3. Select the check box to the left of a project to exclude.



4. Click **Save**.

- A Saved Successfully message briefly shows
- Now that organization is excluded from the module

NOTE You can view all excluded organizations or projects by toggling the button labeled **View Excluded Jobs**.



3.2.2.5 Reporting Tags

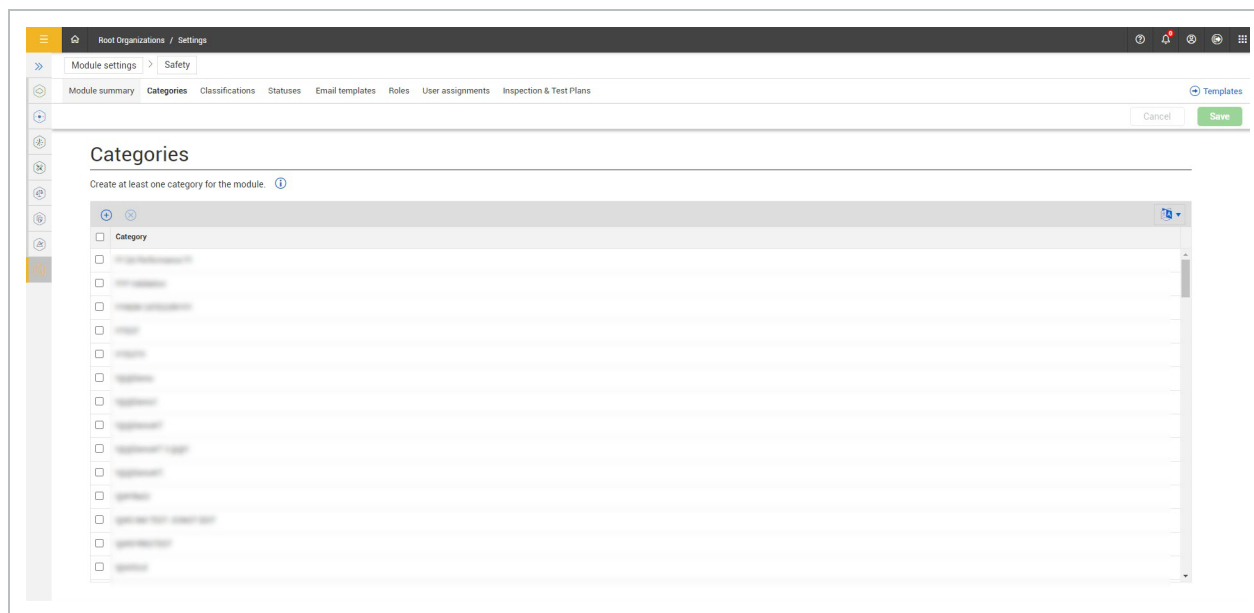
Reporting tags are used to secure information when you use reports. Reporting tags drive permissions when running reports. If a question is assigned a reporting tag and you are not assigned that reporting

tag in Compliance, you cannot see the response to the question in a report. Reporting tags are defined per module. After you add reporting tags in this section, you can assign reporting tags to users and template questions to define who can see reporting data on those questions.

3.3 CATEGORIES

You can create and manage an unlimited number of categories within your organization. Categories are specific per module and can be used as permissions to drive security within the module. By creating categories, you can partition the module into smaller areas that can help define the module's purpose. For example, you could break your module down into four different categories, such as:

- Work types
- Disciplines
- Processes
- Subcontractors



In another example, for the Safety module tab, you could have the categories of:

- Incidents
- Tours
- Observations
- Inspections

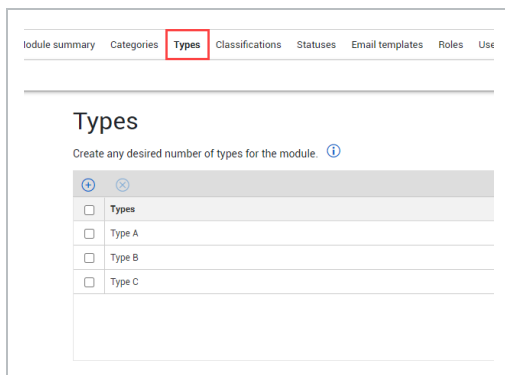
With categories, the options are endless and can be created for anything you need based on your company's use of the module.

3.4 TYPES

3.4.1 Summary

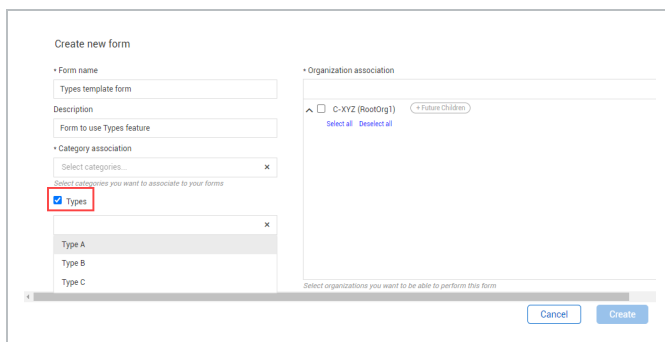
Type values can be used to classify an event or task for association to filters and reporting. They allow you to add identifiers to a template to further define the activity. These are typically associated with identifying the risk of the event or task. Defining types lets you bring awareness to those risks during the closing of a phase in your project.

Types can be defined and added in the Module settings > **Types** tab. They can then be used in the Template Managers properties section, and on the reference question type.



The screenshot shows the 'Types' tab in the Module settings. The tab is highlighted with a red box. Below the tab, there is a section titled 'Types' with a sub-header 'Create any desired number of types for the module.' followed by a list of types: 'Types', 'Type A', 'Type B', and 'Type C'. Each type has a checkbox next to it. The 'Types' checkbox is checked.

In Templates manager, when creating a new form, the Types option is available to select or deselect in the Create new form page. Select the option to associate types to the template. When selected, the Types drop-down menu shows where you can then select from the list of defined types and make them available to use in the template form.



The screenshot shows the 'Create new form' page. On the left, there is a form with fields for 'Form name', 'Description', 'Form to use Types feature', and 'Category association'. The 'Form to use Types feature' field is checked. Below this, there is a section titled 'Select categories you want to associate to your forms' with a list of categories: 'Types', 'Type A', 'Type B', and 'Type C'. The 'Types' category is checked. On the right, there is a section titled 'Organization association' with a list of organizations: 'C-XYZ (RootOrg1)' and 'Future Children'. The 'C-XYZ (RootOrg1)' organization is selected. At the bottom, there are 'Cancel' and 'Create' buttons.

When building the form, Types is automatically populated as a section header.

Like other question types, you can create a chain of associated events, setup default values, associate classifications, add form details, among other options, depending on your business process. After the template form is created, you can enable or disable the Type option in the template properties tab.

When filling in the form, the types option shows as a question. You can select from the pre-defined list.

3.4.2 Considerations

You must have permission Create and edit types.

3.4.3 Steps

To navigate to Types, see steps to access organization level settings in [Settings](#).

To add a Type value:

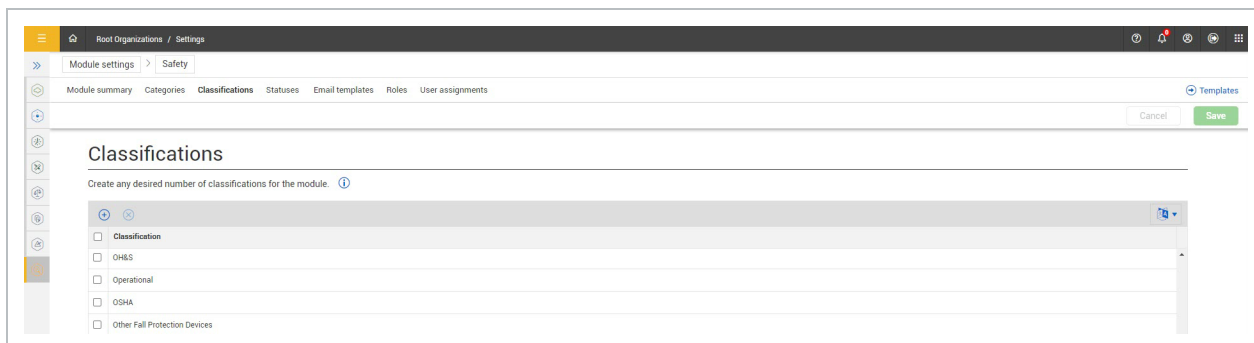
1. Click the **Add** icon.
2. Enter the Type name.
3. Click **Save**.

To delete a Type value:

1. Select a type or types.
2. Click the **Delete** icon.

3.5 CLASSIFICATIONS

Classifications can be used to classify a form for association to filters and reporting, as well as to facilitate logic within a form. Classifications can be used on any form with the module.

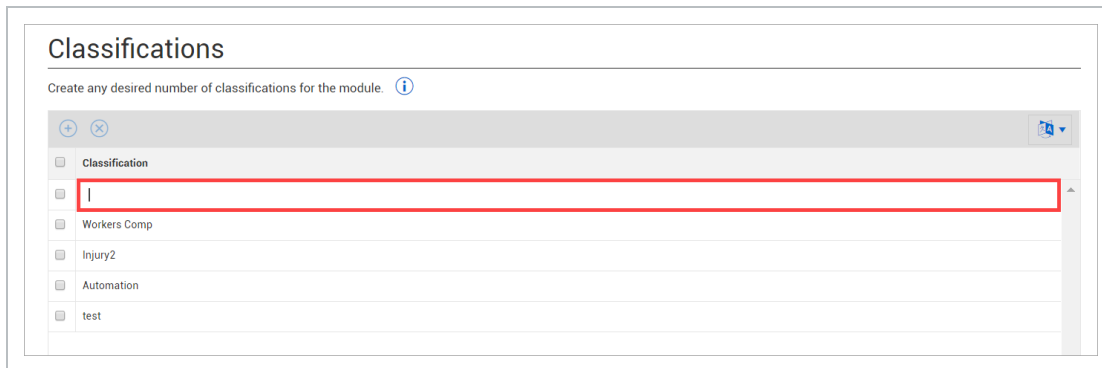


3.5.1 Adding a Classification

The following steps walk you through creating a new classification.

3.5 Step by Step 1 — Add a Classification

1. From within the Classifications tab, click the **Add Classification +** icon.
2. In the newly created line, type in the name of the classification.

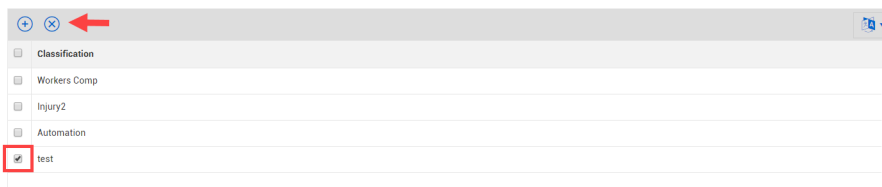


3.5.2 Deleting a Classification

The following steps walk you through how to remove a classification.

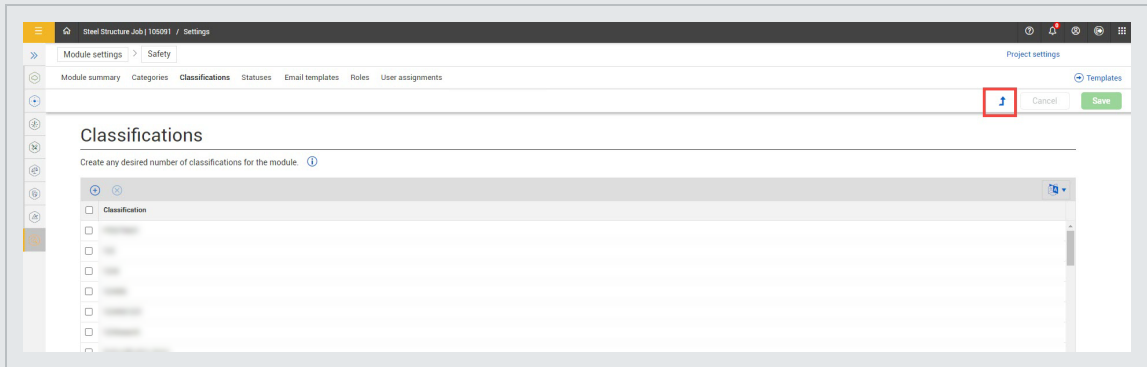
3.5 Step by Step 2 — Delete a Classification

1. From within the Classifications window, click on the **check box to the left of the classification** you desire to delete.
2. Click on the **Delete Classification** icon.



TIP

If a red unavailable circular icon appears and you cannot add or delete an item, it means you are within a project. Project settings can only be modified at the root level. By clicking on the blue upward facing arrow you will navigate to the organization settings.



3.6 EMAIL TEMPLATES

System generated email templates can be applied to events and tasks to send to responsible parties when they are assigned or overdue.

The Assigned event and task emails are sent to responsible parties when assigned a task or event.

The Overdue event, task, and event workflow step emails are sent to responsible parties when their assigned event, task, or workflow step has passed its due date.

The Reversed event workflow notification email is sent to responsible parties when a workflow is reversed back to a step already completed by the responsible party.

Name	Description	Created by	Created on	Last updated on	Last updated by
Assigned event	Assigned event template	Service Account	04/22/2020	09/27/2020	Shubha
Assigned task	Assigned task template	Service Account	04/22/2020	06/12/2020	Service Account
Overdue event	Overdue event template	Service Account	04/22/2020	07/08/2020	Subramanya
Overdue Event workflow step	Overdue Event workflow step template	Service Account	04/22/2020	06/12/2020	Service Account
Overdue task	Overdue task template	Service Account	04/22/2020	06/12/2020	Service Account
Reversed Event Workflow Notification	Reversed Event Workflow notification template	Service Account	04/22/2020	06/12/2020	Service Account

All emails have certain fields that can be edited, as shown highlighted in the image below.

Bold, italic and underline features are also available. You can also add variables so that users can enter information such as reporter names or event titles into emails. To add a variable, type @, and then select an option from the drop-down list.

3.7 ROLES

Roles and permissions are maintained in both InEight Platform and in Compliance respectively. In Platform, they can be accessed by navigating to Suite administration > **Roles and permission**, and then selecting **Organization and project**. The setup and design of Compliance's permissions and roles are different than any other of the InEight cloud platform applications. It is important to know that a Level 3 role (high level permission allowing for the viewing of all modules in Compliance) must be present and maintained correctly in Platform for subsequent users to get added in Compliance.

3.7.1 User Role Definitions

Overview – Platform and Compliance User Role Definitions

Name	Module	Definition	Examples Names
Platform account administrators	Platform	Account Administrators with Level 3 - Account Admin access. Highest level access with view all modules and edit all modules access.	Account Administrator Dev/Ops Administrator
Compliance module administrator	Platform	Responsible for creating or modifying the roles for the specific Compliance Admins within each module.	Safety Dept Administrator Quality Dept Administrator Compliance Product Administrator
Compliance admins	Compliance	Responsible for administering Compliance on a daily basis per the organizational assignments.	Compliance Administrator
Compliance roles	Compliance	Specific job roles with limited access.	Form Creator Crane Manager

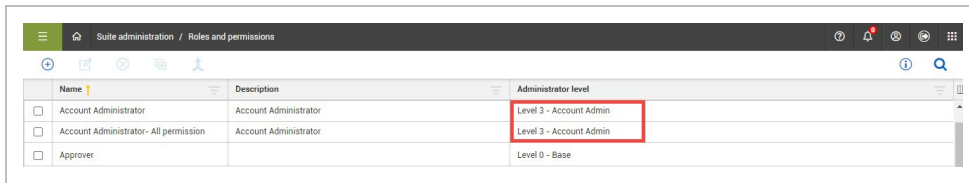
3.7.2 Platform Permissions

Platform Account Administrators need to have Level 3 permissions, which allows access into Compliance with the suitable permissions. By default, this is assigned to an Account Administrator and a Dev/Ops role. This permits full open access to view all modules and should be assigned with discretion. During initial setup, a Platform role lower than Level 3 will not have access into Compliance.

Any other permission to get into Compliance, outside of the Level 3 role needs to be obtained within Compliance.

NOTE

No settings in Platform exist that will allow a level lower than a Level 3 to get into Compliance.

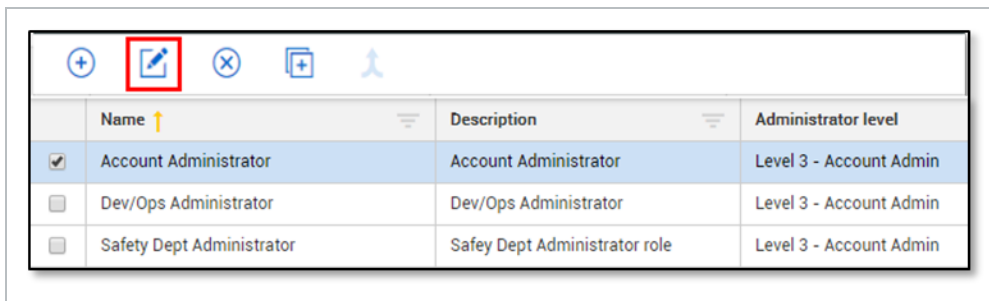


Name	Description	Administrator level
☐ Account Administrator	Account Administrator	Level 3 - Account Admin
☐ Account Administrator- All permission	Account Administrator	Level 3 - Account Admin
☐ Approver		Level 0 - Base

NOTE

A Compliance menu drop-down option does not exist in the Permissions in Suite administration > Roles and permissions > Permissions.

By default, Platform Account Administrators should already be set up to View all modules (as shown below in the Organization and project > Compliance settings). If checked, these settings override all Compliance level permissions. It is required that first user to log into Compliance be a Level 3 user.



	Name	Description	Administrator level
☒	Account Administrator	Account Administrator	Level 3 - Account Admin
☐	Dev/Ops Administrator	Dev/Ops Administrator	Level 3 - Account Admin
☐	Safety Dept Administrator	Safety Dept Administrator role	Level 3 - Account Admin

The Platform Account Administrators will then set up a second user in Compliance. As common practice, the second user in Compliance can then start to assign users directly within Compliance.

NOTE

In general, the average Compliance user does not need a Platform permission to get into Compliance. Users (other than a Level 3 user) are maintained directly in Compliance. A level 3 user assignment overrides all Compliance-level assignments.

3.7.3 Compliance Permissions

Compliance roles are module and Compliance specific. You can set permissions to each role for each module. They are comprised of permissions that you can perform inside of the specific Compliance module.

Within Compliance you can create as many roles as needed to facilitate any process you plan to do within the module. The standard Compliance application comes with the following seated roles:

- **Module administrator** - gives full access to all the permissions and allows anyone with the role to perform these events or actions

- **Reporter** - general role that allows anyone within this role to execute forms in any category or project assigned. It does not allow manipulation of other users, role creation, or template creation
- **Read only** - general role that allows anyone within this role to view events and tasks in any category or project assigned. It does not allow manipulation of other users, roles, templates, events, or tasks

NOTE Any created role defaults to reporter permissions until you change it.

The following tables summarize the actions you can take on individual Compliance pages with each permission.

3.7.3.1 Module Permissions

Permission	Page	Permitted Actions
Edit module summary	Module summary	Add and edit Module name. Add and edit Description. Add and edit Module image. Activate and deactivate module toggle.
	Compliance landing page	View side menu and tiles according to your assignments.
	Module landing page	View side menu Settings link.
Create and edit reporting tags	Module summary	Create and edit tags.
Manage module organization exclusions	Module summary	Exclude or include any level of an organization or project.
Create and edit categories	Categories	Add a category. Edit a category. Inactivate a category. Delete a category.
Create and edit classifications	Classifications	Add a classification. Edit a classification. Inactivate a classification. Delete a classification.

Permission	Page	Permitted Actions
Create and edit statuses	Statuses	Add a status. Edit a status. Inactivate a status. Delete a status.
Edit email templates	Email templates	Edit an email template.
	Compliance landing page	Side menu and tiles according to your assignments.
Create notifications	Events list Tasks list	Create notifications for projects, roles, and users in your assignments.
Create and edit Inspection and Test Plans	Inspection and test plans	Create and edit inspection and test plans in organizations and projects.
Create and edit User groups	User groups	Create and edit user groups.

3.7.3.2 Event Permissions

Permission	Page	Permitted Actions
Edit completed events/tasks	Events list Tasks list	Reopen a completed event to pending status.
	Event (inside) Task (inside)	Use complete button after a closed event or task is edited.
Edit event/task properties	(The subpermissions below can be selected and deselected after Edit event/task properties is selected.) Events list Tasks list Event (inside) Task (inside)	Edit an event or task in your assignments using the Information slide-out panel.

Permission		Page	Permitted Actions
	Edit event/task proj/org	Form flow panel on event	Edit any role or user in available steps.
		Events list Tasks list Event (inside) Task (inside)	Edit the Proj/org field of any event or task in your assignments using the Information slide-out panel.
	Edit event/task category	Events list Tasks list Event (inside) Task (inside)	Edit the Category field of any event or task in your assignments using the Information slide-out panel.
	Edit event/task due date	Events list Tasks list Event (inside) Task (inside)	Edit the Event date and Due date fields of any event or task in your assignments using the Information slide-out panel.
	Edit event/task status	Events list Tasks list Event	Edit the Status field of any event or task

Permission	Page	Permitted Actions
	(inside) Task (inside)	in your assignments using the Information slide-out panel.
	Edit event/task Reporter/Responsible party	Edit the Reporter and Responsible party fields of any event or task in your assignments using the Information slide-out panel.
	Edit event/task title	Edit the title field of any event or task in your assignments using the Information slide-out panel.
Delete events/tasks	Events list Tasks list	Delete any event in assignments area.
Only provide access to own forms/tasks on the event/task list (Select one or more categories from the drop-down list)	Events list Tasks list	View only events where you are a reporter. You cannot see

Permission	Page	Permitted Actions
		any other events or tasks you did not initiate as a reporter.
View deleted categories in the event/task list	Events list Tasks list	Filter to show inactivate categories.
Copy events/tasks from event/task lists	Events list Tasks list	Copy an event or task. You cannot copy an event with form flow.
Allow access to event/task history (Select one or more categories from the drop-down list)	Event and task information panel	View the history of the event or task.

3.7.3.3 Roles/Users Permissions

Permission	Page	Permitted Actions
Create and edit roles	Roles	Add a new role. Edit a role. Copy a role. Delete a role.
	Add role dialog box	Add a name. Add description. Select active check box. Add all permissions.
	Edit role dialog box	Edit a name. Edit description. Select active check box. Edit all permissions.

Permission	Page	Permitted Actions
	Compliance landing page	View side menu and tiles according to your assignments.
	Module landing page	View side menu Roles link.
Create and edit user assignments	User assignments	Add a new assignment. Edit an assignment. Copy an assignment. Inactivate an assignment. Delete an assignment. Transfer user assignments. Create a user group.
	Compliance landing page	View side menu and tiles according to your assignments.
	Module landing page	View side menu User assignments link.
Restrict the ability to assign users to the following roles	Add user assignments wizard	Enable roles available to create a user assignment.
	Edit user assignments icon on assignments slide-out panel	Edit icon is available only if roles from list associated with the permission are the only roles on the assignment. If an assignment includes a role that is permitted and a role that is not permitted, you cannot edit the assignment.
	Remove user assignments	Remove icon is available only from roles list associated with the permissions.
Restrict the ability to assign users to only the following reporting tags	Add reporting tags dialog box in User assignments	Can only assign the selected reporting tags to users.

3.7.3.4 Template Permissions

Permission	Page	Permitted Actions
Create and edit templates	Templates manager forms	Create a new form. Edit a form. Copy a form. Inactivate a form. Delete a form.
	Templates manager tasks	Create a new task. Edit a task. Copy a task. Inactivate a task. Delete a task.
	Form builder	Use all functions including form flows.
	Task builder	Use all functions including form flows.
	Compliance landing page	View side menu and tiles according to your assignments.
	Module landing page	View side menu Templates manager link.

3.7.3.5 Read only role

NOTE

The Make this role read only check box is at the bottom of the Add role or Edit role dialog boxes.

Permission	Page	Permitted Actions
Make this role read only	Compliance landing page	View side menu and tiles according to your assignments.
	Module landing page	View links. View forms. View tasks. To-do list is not shown because forms and tasks cannot be assigned.
	Events page	View events according to your assignments.

Permission	Page	Permitted Actions
		View information side panel. Cannot enter information in fields.
	Tasks page	View tasks according to your assignments. View information side panel. Cannot enter information in fields.

3.7.4 Dashboard Permissions

Your project's home landing page dashboard will always show the Compliance option on the left side bar menu and the Compliance tile on the dashboard, regardless of a user's permissions.

If you click on the Compliance tile or select Compliance from the side bar menu, and do not have the appropriate Compliance permissions assigned within Compliance, a message will appear requesting you to coordinate permissions setup with your Admin.

3.7.5 Permissions Workflow

The following diagram maps out the Compliance permissions workflow phases.

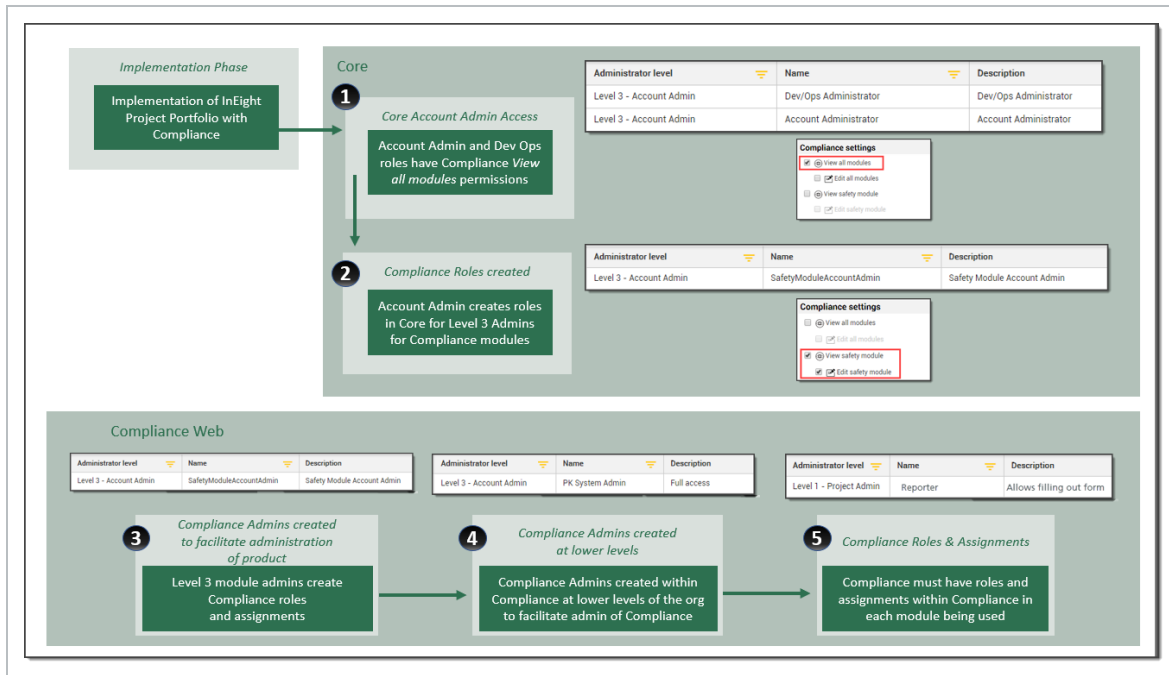
Compliance Permission Phases

#	Phase	Module	Definition
	Implementation Phase	Platform and Compliance	The process for creating Platform and Compliance permissions in the InEight cloud platform.
1	Platform Account Admin access	Platform	Dev Ops and other Account Admin roles have Compliance permissions, allowing for full open access into Compliance. Suite administration > Roles and permissions.
2	Compliance role creation in Platform	Platform	The Account Admin creates Compliance Module Admin Level 3 roles for Compliance module specific administration. This is specific to the roles' discipline. Examples: • Safety Dept Administrator • Quality Dept Administrator • Environmental Dept Advisor • Compliance Product Administrator

Compliance Permission Phases (continued)

#	Phase	Module	Definition
			The Account Admin changes the settings for the Safety Dept. Administrator to have View safety module and Edit safety module access. Suite administration > Roles and permissions
3	Compliance Admins created to facilitate administration of product	Compliance	Compliance Module Admin creates the Compliance Administrators, who facilitate the administration of the Compliance product. Allows for ability to make other Compliance assignments.
4	Admins are created within Compliance at lower levels	Compliance	You can use the seated Administration role for providing role access. Compliance Admins are created within Compliance at lower levels of the organization to facilitate administration of the product.
5	Compliance must have roles & assignments per module	Compliance	You can use the seated Reporter role for the activity of filling out forms. Other (limited access) role options available based on your business needs. Compliance must have roles and assignments within Compliance in each module being utilized.

3.7.6 Permissions Workflow Diagram



3.7.7 Implementation Phase Setup & Activities

The Compliance Implementation phase for InEight cloud platform involves setting up permissions and roles for your Compliance users, in both Platform and in Compliance.

Step 1: Platform Account Admin Access

The Level 3 – Account Admin roles first need to possess Level 3 – Account Admin level access.

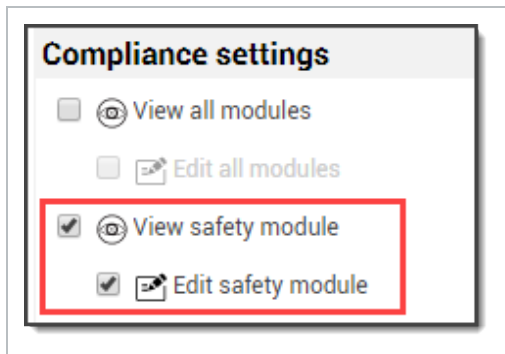
Platform Account Administrators need to have Level 3 – Account Admin permissions to be able to grant access to the Compliance Admins such as the Safety and Quality Dept Admins. You can edit the Level 3 roles in **Suite administration > Roles and permissions** by selecting Account Administrators and clicking on the change icon.

If a Platform Account Administrator does not have Level 3 – Account Admin access, click the check box next to the name of the role and select **change**.

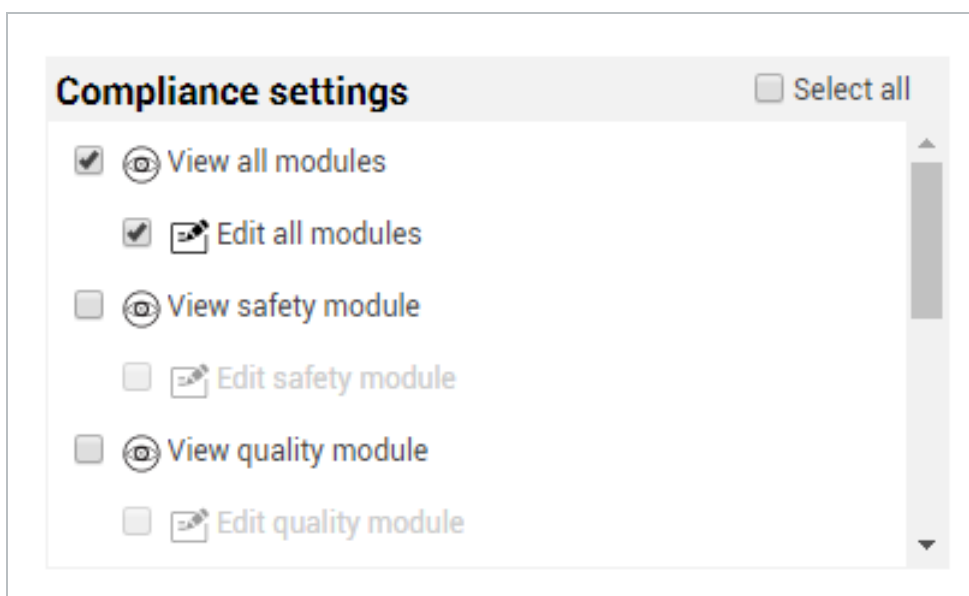
Scroll down the screen to select the Organization and project menu to view the Compliance settings permissions.

NOTE

Compliance does not have its own menu under Permissions. The Compliance settings are located under the Organization and project menu.



The Platform Account Administrator needs to then navigate into the Suite Administration > Add or Edit Role > Suite Administration > **Compliance** setting to adjust Administrator level to Level 3, then grant access to both View and Edit all modules. By selecting both permissions, it will override all permissions that are set within Compliance.

**TIP**

The typical Compliance user does not need a Platform permission to be able to get into Compliance.

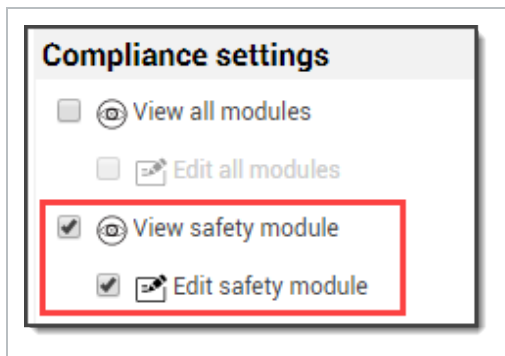
Step 2: Compliance Role Creation in Platform

When the Platform Account Administrators have the proper Platform Compliance permissions, they can create or modify the roles for the specific Compliance Module administrators. The Platform

Account Administrator needs to create specific Compliance module-based roles in Platform that resemble the type of work being done in Compliance.

For example, in Suite administration > **Roles and permissions**, the Platform Account Administrator may want to create a role for the Safety Director in Platform and grant View safety module access along with Edit safety module access.

The Safety Director - Admin role needs the following access settings:

**NOTE**

The users in these roles will typically not be administering Compliance daily. This activity would be a role within Compliance.

The reasons for creating the Compliance Admin roles are to:

- Allow for organizational management
- Bypass Compliance permissions
- Keep security within the modules to appropriate personnel

Step 3: Compliance Admins Created to Facilitate Administration of Product

This role is responsible for setting up Compliance, defining process, and administering Compliance daily per the organizational assignment. When the Compliance Module Administrator roles are created, they can now go into Compliance and assign the organization user responsible for creating and assigning Compliance permissions.

In the previous step, the Safety Director was granted access to both View safety module and Edit safety module. The Safety Director can now navigate to the landing page and navigate to Settings.

The Safety Director can then select the Compliance settings.

The Safety Dept Administrator is now in the Module Summary within Compliance, with the goal of altering permissions. Steps 4 and 5 will describe functions for the roles of a Compliance Admin and a Reporter.

The Safety Department Administrator is responsible for maintaining all of the higher-level settings within Compliance, which includes the highlighted settings below.

Step 4: Compliance Admins Created at Lower Levels

This Compliance Administrator is responsible for administering Compliance on a daily basis per the organizational assignments. After this role is created, the Compliance Admin can then create roles in

Compliance for other users. This could include other administrators at lower levels, reporters, form creators, etc. This role could also create role permissions that then create other role permissions.

After selecting Roles, you see a list of Compliance roles. All of these roles can be created and modified by the Compliance Administrator which is a seated role. You can also create other roles for different Compliance activities.

NOTE

The Administrator and Reporter roles are both seated roles. All other roles are customer created.

By clicking on the **Name**, the (Compliance) Administrator has access to every permission available within Compliance.

This includes create/edit roles, and to create and edit user assignments. This role is intended to have full access to Compliance module permissions as shown under Roles/Users permissions.



Step 5: Compliance Roles & Assignments Per Module

Other roles within Compliance can have limited access to perform job specific roles, just like the seated role called Reporter.

Module settings > Safety						
Module summary		Categories	Classifications	Statuses	Email templates	Roles
		User assignments				Templates
						Search
Name	Description	Created by	Created on	Last updated on	Last updated by	
☐ Reporter	Reporter - Allows performin...	Service Account	11/04/2019	11/04/2019	Service Account	

The (Compliance) Reporter role has very limited access. The primary role for Reporter is to fill out forms within Compliance. Other roles can be created at this level with various role permissions.

Other limited roles could include job functions like:

- Crane Manager - manager of the crane group, can delete crane items
- Form Creator - can create and modify forms

The Read Only Roles comes automatically with Compliance to allow users to access the system but not perform action as such as filling out forms or tasks. You can also turn any role into a read only role which enable the role permission to view anything within their assignment(s).

3.7 Step by Step 1 — Create Read only Access

1. From the Compliance Landing Page, click on a tile.
2. Click **Roles** under Administration.
3. Click the **Add Role** icon.
4. Complete the Name and Description fields.
 - Do not select any of the options under the remaining drop-down boxes
5. Select the **Make this role read only** check box.
6. Click **Save**.

3.8 STATUSES

Statuses represent the condition of a form or task. In the Statuses settings, you can create new statuses as well as change or add colors to the statuses. You can apply statuses to each module of an

organization and then create child statuses to facilitate their processes. You can apply these statuses to events with or without a form. You can also apply statuses to a form and it shows on the Events page. Compliance has some standard statuses that each have their own requirements.

The screenshot shows the 'Statuses' configuration page. At the top, there are tabs for 'Module summary', 'Categories', 'Classifications', 'Statuses', 'Email templates', 'Roles', and 'User assignments'. The 'Statuses' tab is active. Below the tabs, there is a 'Cancel' button and a 'Save' button. The main content area is titled 'Statuses' and includes a sub-header 'Create any additional statuses for the module.' followed by a plus icon. Below this, there is a table with columns for 'System/User-defined status', 'Background', and 'Text'. The table lists several statuses: 'Complete' (with sub-statuses 'Legal Approved' and 'Sub complete 1'), 'Pending' (with sub-statuses 'In Review' and 'Reopened'), 'Scheduled', and 'Canceled' (with sub-status 'Canceled SS 1'). Each status has a corresponding background color and text color.

The following table provides more information about the default status available.

Status	Notes when:	Customizable	Permissions	Can be Overdue	Editable
Complete	Form or Task is completed, and workflow is done.	X	Has permissions tied to it such as when completed form or task locks and cannot be reopened by certain roles.	NO	Permission based
Pending	Form or Task is started and is in this status until completed.	X	All roles have permission to this status.	YES	X
Scheduled	Task has been scheduled.		All roles have permission to this status.	YES	X

Status	Notes when:	Customizable	Permissions	Can be Overdue	Editable
Canceled	Form or Task was started but there is no intent to complete it.	X	All roles have permission to this status.	NO	X

The standard statuses cannot be renamed to your appropriate business lingo or terms that facilitate more intuitiveness for the process the form is facilitating.

3.8.1 Differences between States and Statuses

States are another indication of form or task condition that are different from statuses. States cannot be changed or customized by your choices, unlike statuses. States are driven only by your actions on forms or tasks. States let you know that a work item is overdue regardless of its status in your workflow or process.

The following table provides more information about the available states.

State	Notes when:	Work item types
In Process	Form or task is pending.	Forms and tasks
Complete	Form or task is complete.	Forms and tasks
Overdue	Form or task workflow or due date has passed.	Forms and tasks
Saved	Task is not yet assigned.	Tasks only
Scheduled	Form or task has been scheduled.	Forms and tasks
Canceled	Form or task was started but there is no intent to complete it.	Forms and tasks

3.9 USER ASSIGNMENTS

User assignments contain all the users from InEight Platform. Compliance also pulls the user's email and status of active/inactive from the user profiles.

In the user assignments tab, you can assign, edit and add new users to specific Compliance modules. You can also transfer assignments between users and add reporting tags to users.

TIP

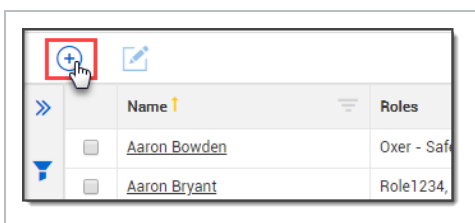
You can also configure automatic user assignments on the Module summary tab. See [Module Summary and Organization](#) for more information.

[illegible]

In the Add new assignments wizard, a user consists of an organization, project, category, and role. The following Step by Step walks you through adding a user assignment.

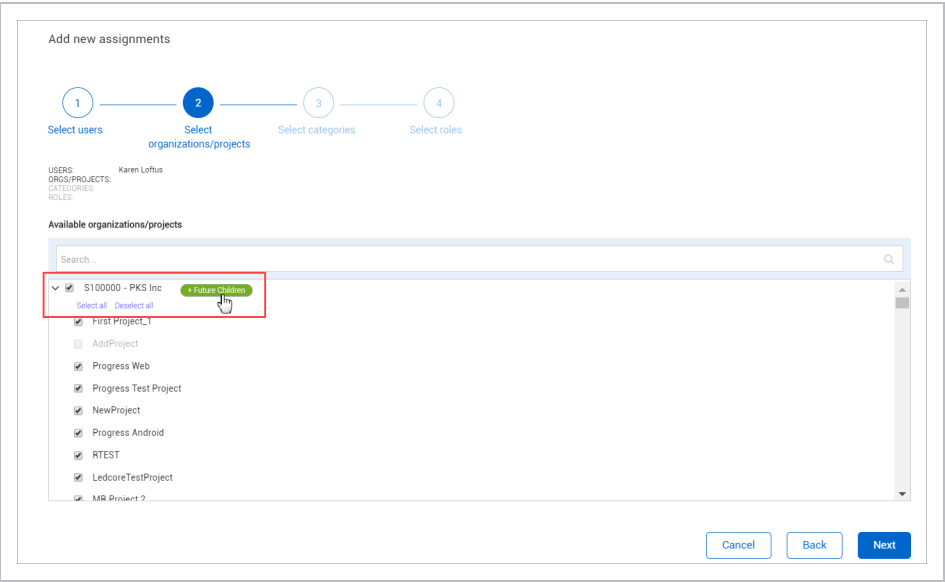
3.9 Step by Step 1 — Add a User Assignment

1. Choose **User assignments** from the listed tabs below the Safety tab.
2. Click the **Add** icon, and then select **Add user assignments** from the drop-down list to add new assignments.



3. Choose an Available user from the list shown.
4. Click the **right arrow** to move the available user to the selected users list.
5. Click **Next**.
6. Select a Job from the Available organizations/projects list.

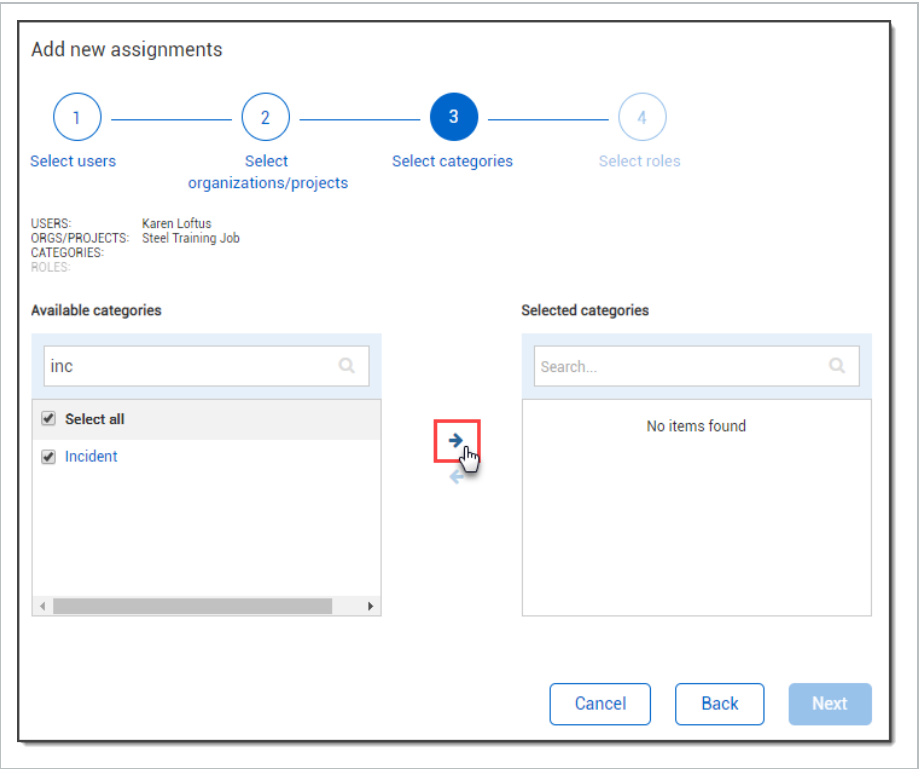
7. Click the **right arrow** to move a Job to the selected organizations/projects list.



8. Click **Next**.

9. Select a category from the Available categories list.

10. Click the **right arrow** to move the category item to the selected categories list.



- 11. Click **Next**.
- 12. Select a **Role** from the available roles list.

Add new assignments

1 — 2 — 3 — 4
 Select users Select organizations/projects Select categories Select roles

USERS: Karen Loftus
 ORGS/PROJECTS: Steel Training Job
 CATEGORIES: Incident
 ROLES:

Available roles

Search: reporter

- ☐ Select all
- ☐ Oxer - Safety Reporter
- ☐ Oxer Assigner - Only Safety Reporter
- ☒ Reporter

Selected roles

Search: No items found

Cancel Back Done

13. Click the **right arrow** to move the Role to the selected roles list.

14. Click **Done**.

- Your new user assignment has been created and is shown in the list of user assignments

Name	Roles	Email	Active/Inactive	Le
Karen	Reporter	karen@ineight.com	Active	00

You can reassign forms, tasks, and workflow between users by transferring user assignments. The following Step by Step walks you through transferring a user's assignments.

3.9 Step by Step 2 — Transfer User Assignments

1. Click a username in the User assignments page.
2. In the dialog box, click the **Transfer assignment** icon next to the role you want to transfer.

NOTE

You can only transfer one role's assignments at a time.

Organization/Project	Role	Category	
C-XYZ-C-XYZ (Future Children)	3rd Party Claims Manager	Audits,Claims,Crane,Daily Safety Huddle,Injuries,Insp...	
C-XYZ-C-XYZ (Future Children)	Compliance module administrator	Audits,Claims,Crane,Daily Safety Huddle,Injuries,Insp...	
C-XYZ-C-XYZ (Future Children)	Crane Manager	Audits,Claims,Crane,Daily Safety Huddle,Injuries,Insp...	
C-XYZ-C-XYZ (Future Children)	Form Creator	Audits,Claims,Crane,Daily Safety Huddle,Injuries,Insp...	
C-XYZ-C-XYZ (Future Children)	Job Safety Administrator	Audits,Claims,Crane,Daily Safety Huddle,Injuries,Insp...	
C-XYZ-C-XYZ (Future Children)	Manager	Audits,Claims,Crane,Daily Safety Huddle,Injuries,Insp...	
C-XYZ-C-XYZ (Future Children)	Purchasing	Audits,Claims,Crane,Daily Safety Huddle,Injuries,Insp...	
C-XYZ-C-XYZ (Future Children)	Read-only	Audits,Claims,Crane,Daily Safety Huddle,Injuries,Insp...	
C-XYZ-C-XYZ (Future Children)	Reporter	Audits,Claims,Crane,Daily Safety Huddle,Injuries,Insp...	
C-XYZ-C-XYZ (Future Children)	Safety Manager	Audits,Claims,Crane,Daily Safety Huddle,Injuries,Insp...	

[Add new assignments](#)

3. In the Transfer user assignments wizard, select the user you want to transfer assignments to, and then click **Next**.
4. Select the categories whose assignments you want to transfer, and then click **Next**.
5. Select the organizations and projects whose assignments you want to transfer, and then click **Next**.
6. Select either **Transfer and close** or **Transfer**.

NOTE

If you click Transfer, you can then select the next user to continue transferring assignments to another user.

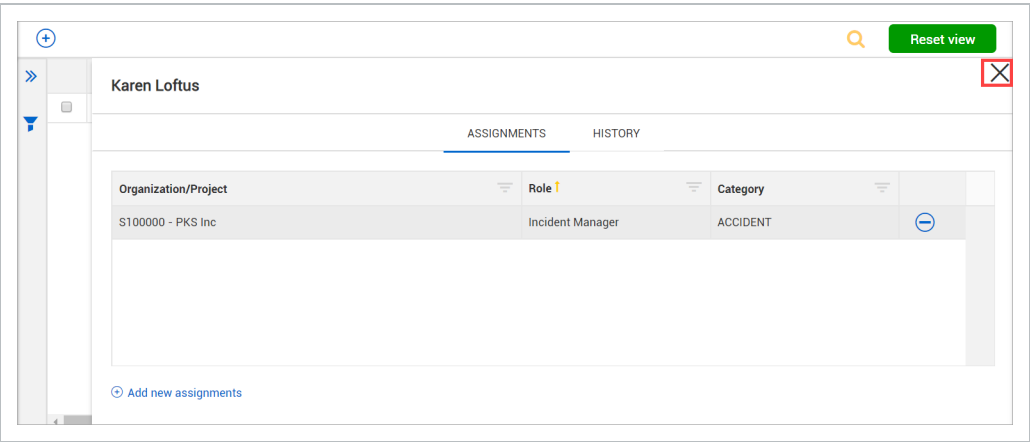
NOTE

An email is sent to the target user when assignments are transferred.

A user can have many different assignments. All user assignments do not affect the Core roles within the product portfolio at any time.

3.9 Step by Step 3 — View User History and/or Roles

1. Within a module, click on any Compliance Tile and select User Assignments.
2. Search for desired individual using the scroll bar or via the Search  icon.
3. Click on the individual's **Name**.
4. Click on either the **Assignments** or **History** tab.
5. Click the **X** to close the individual's view.



3.9.1 Reporting Tags

Reporting tags define who can see reporting data on template questions with the same tags as the users.

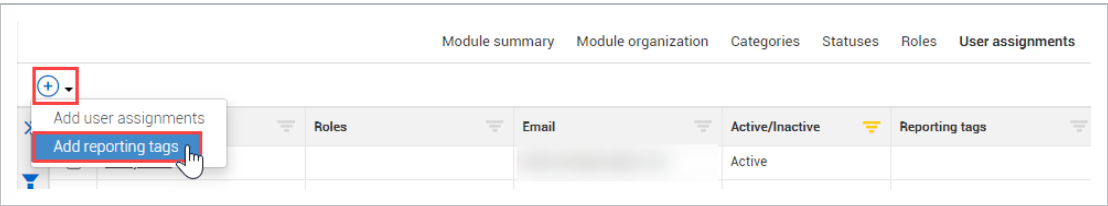
NOTE

Reporting tags are configured on the Module summary tab. See [Module Summary and Organization](#) for more information.

The following Step by Step walks you through how to add reporting tags to users.

3.9 Step by Step 4 — Add Reporting Tags to Users

1. Click the **Add** icon, and then select **Add reporting tags** from the drop-down list.



- The Add reporting tags dialog box opens
2. Select the users you want to add reporting tags for.

TIP

You can search for users or turn on **View selected Users** to limit your view to only users you select.

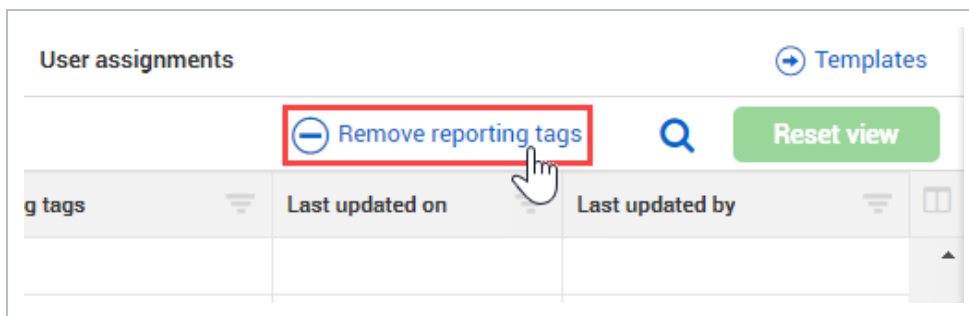
3. Click **Next**.
4. Select the reporting tags you want to add to your selected users.

TIP

You can search for reporting tags or turn on **View selected reporting tags** to limit your view to only tags you select.

5. Click **Save**.

To remove reporting tags from users, select the check box next to a user, and then click **Remove reporting tags** in the upper-right of the page.

**NOTE**

If you remove reporting tags from a user, that user is no longer able to see any reporting associated with the removed tags.

3.10 USER GROUPS

User groups are used to give access to events and tasks that might be beyond users' usual permissions. User groups can be configured only at the project level.

A user group can be used to give access to events and tasks to members of that group, even if they would not normally have permission to view events or tasks in a certain category. Being in a user group also allows group members to show up in the people picker and become a user who can be a responsible party on a task.

After you create a user group, you can assign the user group to individual forms or tasks when you fill them out or when you open an event or task after it has been started. See [Filling Out a Form and Task - Web](#) and [Event and Task Management](#) for more information.

On the User Groups project settings tab, you can create, edit, copy, deactivate, and delete user groups.

NOTE

To delete a user group, you must deactivate it first, and then remove all users from the group.

The following Step by Step shows you how to add a user group.

3.10 Step by Step 1 — Create a User Group

1. In module settings at the project level, click **Project settings** in the upper-right of the page.

The screenshot shows the 'Project settings' page for the 'Safety' module. The 'Project settings' link is highlighted in the top right corner. The 'Module summary' section includes fields for 'Module name' (Safety), 'Description' (A module to track and manage safety related business processes.), and 'Email address' (InEight.Mail@INEIGHT.COM). The 'Configurations' section lists settings like 'Alternate hierarchy', 'Automatic user assignments', 'Language settings', 'Module organization', and 'Reporting tags'.

2. In the User Groups tab, click **Create user groups**.

The Create user group dialog box shows

The screenshot shows the 'Create user group' dialog box. The dialog has a header with 'safety > Project settings' and a 'USER GROUPS' tab. Below the header is a table with columns for 'Name', 'Created', and 'Views'. Two groups are listed: 'Inspection viewers' (Created Jan 14, 2021 01:20 PM Neil Stein, Views of inspection forms) and 'Safety tour viewers' (Created Jan 14, 2021 02:26 PM Neil Stein, Views of safety tours). A 'Create user group' button is in the top right corner.

3. Enter a user group name and description, and select users to include in the group.
4. Click **Save**.

3.11 PRODUCT SETTINGS

In Compliance settings, the Product settings page contains settings that apply to the entire application instead of specific modules. The Product settings page contains the Module management and Template integrations subtabs.

The following step by step shows you how to open Product settings.

3.11 Step by Step 1 — Open Product Settings

1. From your organization or project home page, select **Settings** from the side menu.
2. Select **Compliance** in the side menu on the Settings page. The Module settings page opens.
 - There are additional ways to open Compliance settings. See [Settings](#) for more information.
3. Click the **Product settings** tab. The Module management subtab opens.

3.11.1 Module Management

On the Module management subtab, you can manage all the modules for your organization or project.

3.11.2 Template Integrations

On the Template integrations subtab, you can manage all the template integrations with other InEight applications for your organization or project.

NOTE Template integration works only with InEight Change and only for tasks.

PRODUCT SETTINGS		MODULE SETTINGS			
Module management		Template integrations			
☐	Integration title	Template name	Module	Category	Associated products
☐	Change issue form	Online order	Change	Tasks	Change
☐	Change Task	Change - Task	Change	Tasks	Change

To edit an integration, click the integration name. To delete an integration, select the integration, and then click the **Delete** icon.

For more information about template integrations, see [Template Integration](#).

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TEMPLATE MANAGEMENT

Lesson Duration: 40 Minutes

Lesson Objectives

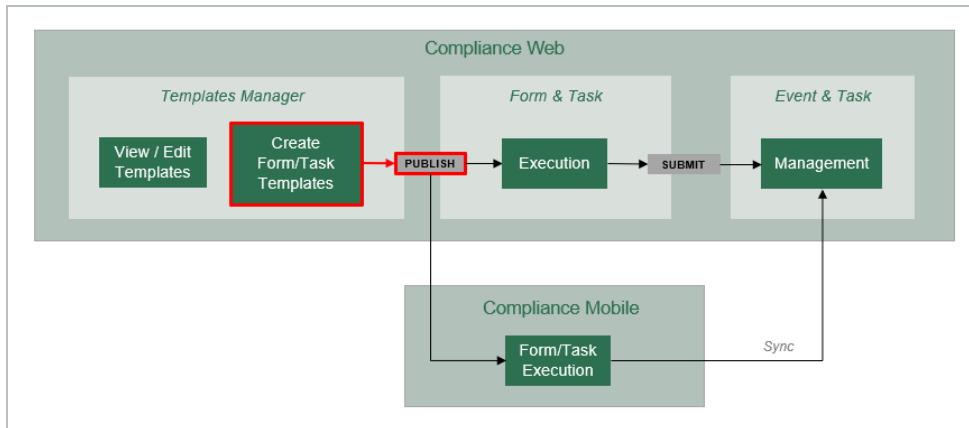
After completing this lesson, you will be able to:

- Explain the purpose of both form and task templates and how they are managed in InEight Compliance
- Navigate the Templates Manager page
- Create and build out both a form and task template

Topics in this Lesson

4.1 Template Overview	86
4.2 Template Creation	91
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4.4 Referenced Forms and Tasks	125
4.5 Integrated List	128
4.6 Template Properties	130
4.7 Template Integration	136
4.8 Template Translation	139
4.9 Form Flows	142
4.10 Template History Tab	149

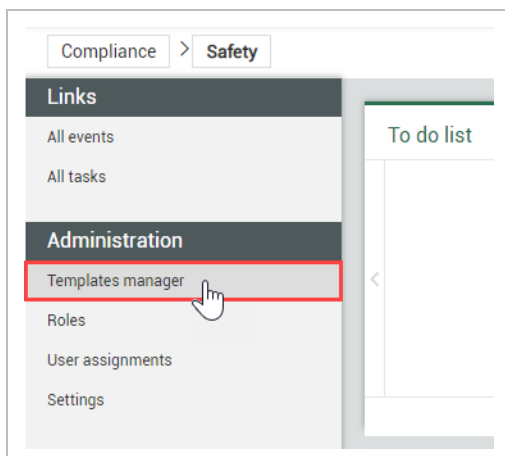
4.1 TEMPLATE OVERVIEW



A template is a task or a form (or checklist) set up in advance for inspections and other tasks that require documentation during the life cycle of your projects.

You can use templates to standardize your organization's form and data capturing process. For example, if your projects always require a safety tour, you can create a safety tour template, so the same safety tour form is used for every project. This leads to capturing the same data from project to project, and to reporting that is clear, concise and meaningful. At the same time, should your project have unique requirements for a safety tour, you can customize your template for your specific project needs.

The Templates Manager is the storehouse for all your template forms. You access the Templates Manager from any of your Module landing pages.

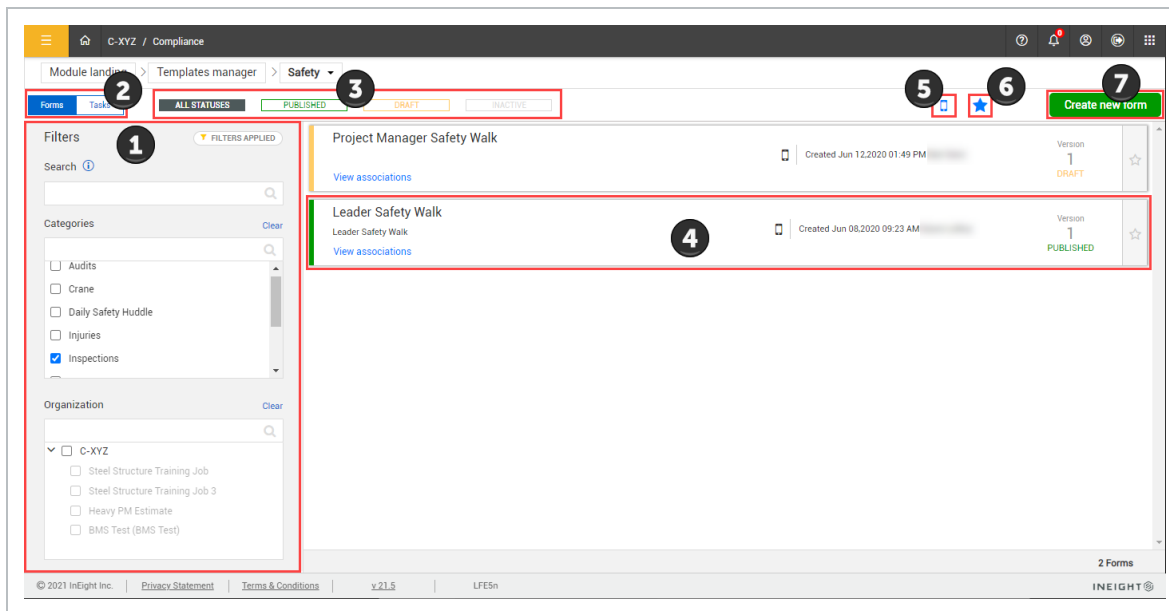


NOTE

Depending on your permissions, you may not have access to edit or create new template forms/tasks, but you will still have access to copy them.

Overview – Templates Manager

	Title	Description
1	Filters	Search for a template by keyword or filter down your templates by selecting the appropriate category and/or organization.
2	Form/Task toggle	Toggles between each the Form and Task templates, per module.
3	Template status	Each template has a status: Published - available to fill out via web or mobile device Draft - being built and not yet available for use to fill out Inactive - not drafts, but available to activate when needed Selecting a status option filters to only templates with that status.
4	Template form	Provides key information about the template, including: form name and ID, associations, creation date, time and author, and version. When hovered over, options appear to delete the form (if it is a draft) or to edit, copy, or deactivate the form (if it is published).
5	Available on mobile	This option visually identifies if a template is available on a mobile device. [Shown as the column “Mobile” when in the List View for Tasks.]
6	Favorites	This option filters to templates tagged as favorites.
7	Create new form/task	Click this button to launch the Form Builder/Task Builder page, where you can create a new template form or task.



4.1.0.1 Templates Manager page view

Each template form or task shows key information about the form or task, including:

- Name and Description of the form/task
- Associations
- Availability on Mobile
- Creation date, time, and author
- Version
- Status

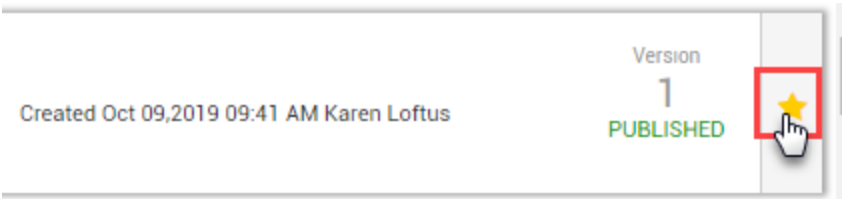


4.1.0.2 Versioning

A new version is created when a draft is published. Even if no information has changed on the template. Once it enters a draft status and that draft is published it will move to the next version.

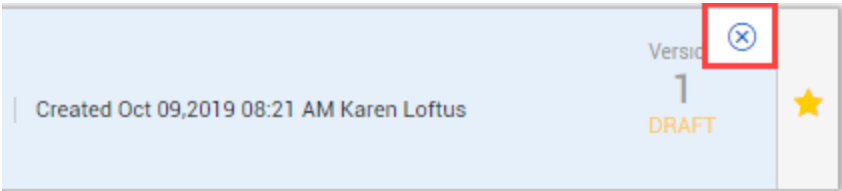
4.1.0.3 Favorites

You can select the **star** at the right-end of the card to mark the template as a favorite.

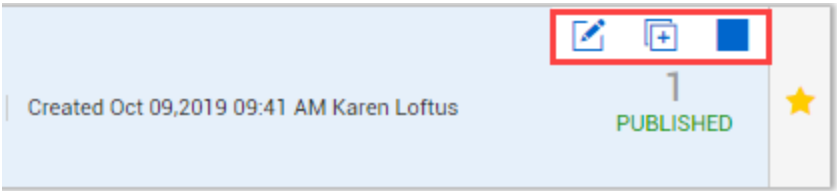


4.1.0.4 Additional Options

When you hover over the card, additional options appear for the form/task. For draft templates, a delete option appears.



For published templates, options appear to either edit, copy, or deactivate the form/task.



4.1.1 Filters

The left panel of the Templates Manager contains a search bar to look up templates by keyword, as well as filtering lists to narrow down your template list.

There are two filtering categories: Categories and Organization. Checking the box for one of the filter options filters the view to just the templates associated with that filter.

The screenshot displays the 'Templates manager' interface. On the left, a 'Filters' sidebar is highlighted with a red box. It contains a search bar, a 'Categories' list with checkboxes for Audits, Claims, Crane, Daily Safety Huddle, Injuries, Inspections, JHA's, and JSA's, and an 'Organization' list with checkboxes for C-XYZ (RootOrg1) and several sub-organizations. The main area shows a list of templates with columns for name, creation date, version, and status. The status column uses color-coded labels: PUBLISHED (green) and DRAFT (orange). A 'Create new form' button is located at the top right of the interface.

NOTE

The only items that appear as choices within the Filters side panel are the ones that have templates associated to them. In other words, you can have more categories or projects in the system, but they won't display in the Filters panel unless you have created a template that uses them.

TIP

All the filters work together. If you are not seeing what you need, clear all the filters and start with a fresh search.

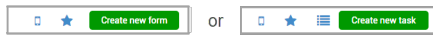
4.1.2 Favorites

Selecting the **Favorites** icon filters down your view to just the templates you tagged as favorites. This is a quick way to narrow down to only the templates you use most often.



4.2 TEMPLATE CREATION

With the correct permissions, you can create new form and task templates in the Templates manager. From the Templates manager page, to create a new template, click the **Create new form** or **Create new task** button.



This launches a two-step process:

1. Creates a dialog box, which leads to:
2. The Form builder or Task builder

4.2.1 Create a Form or Task Dialog Box

On the Create a form or Create a task dialog box, fill out basic information and settings for the form or task.

NOTE

You only have the options to create templates for organizations, projects and categories for which you already have assignments.

Each new form or task requires these initial entries:

Overview - Create a Form Dialog Box

	Title	Description
1	Form or task name and Description	The name or title you give to the template. An optional description can also be added.
2	Category and Organization associations	Associating the form or task with categories and organizations makes it easy to find the form or task using the category and organization filters on the Templates manager page. Categories also determine who can use the forms or tasks. If you do not have assignments to that category, you will not be able to view the form or task to fill it out.
3	Availability on mobile devices	A switch you can turn on to make it available on iOS mobile devices.

Overview - Create a Form Dialog Box (continued)

	Title	Description
4	Event title and date settings	These settings indicate whether the date and title will be filled out automatically with the system default or if they will be filled out with a custom title and date by the person filling out the form or task. An expiration date can also be added if the check box is selected.

Create new form

1

* Form name

Description

2

* Organization association

C-XYZ

+ Future Children

Select all

Deselect all

3

* Category association

Select categories...

Select categories you want to associate to your form

4

Available on mobile ?

Event title

System default

Event date

System default

Add expiration date

Available through form button only?

Cancel

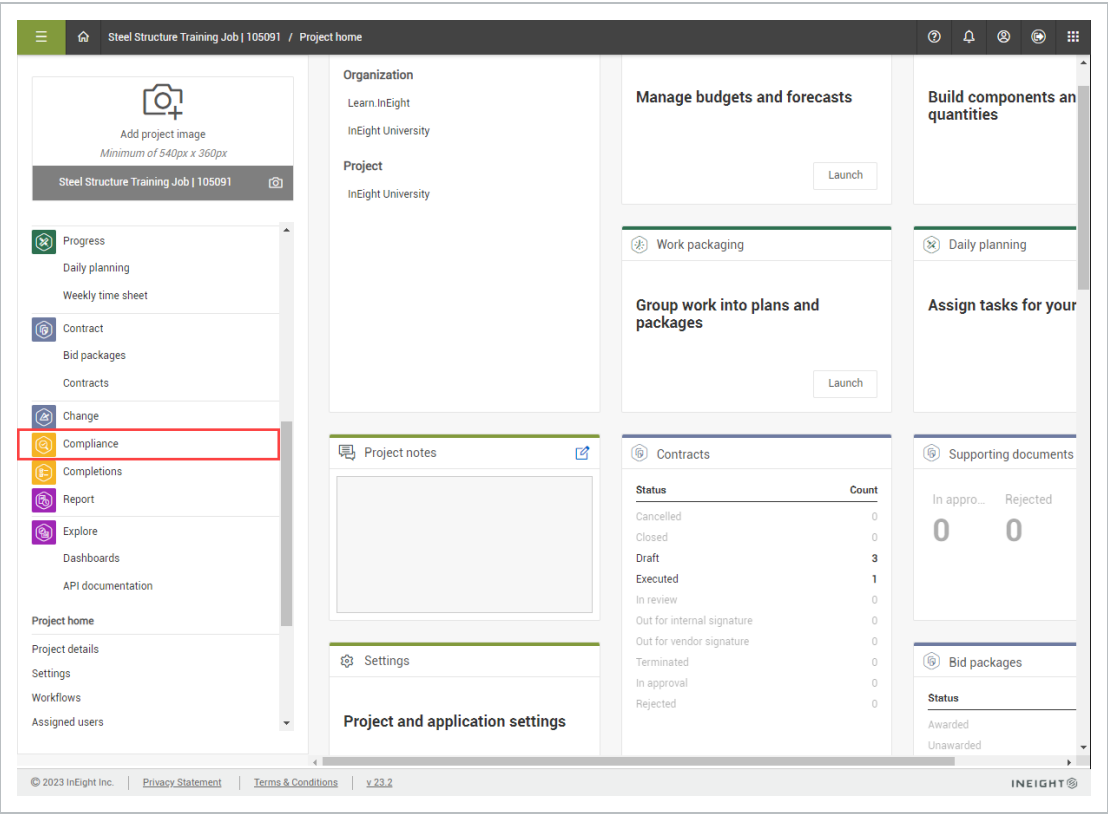
Create

After being filled out, clicking **Create** creates a new template form or task and the system automatically progresses to the appropriate Form builder or Task builder page. You can continue building your form or task or come back later.

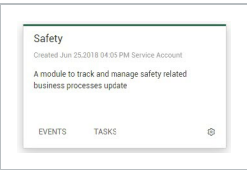
The following steps walk you through creating a new template form.

4.2 Step by Step 1 — Create a Template Form

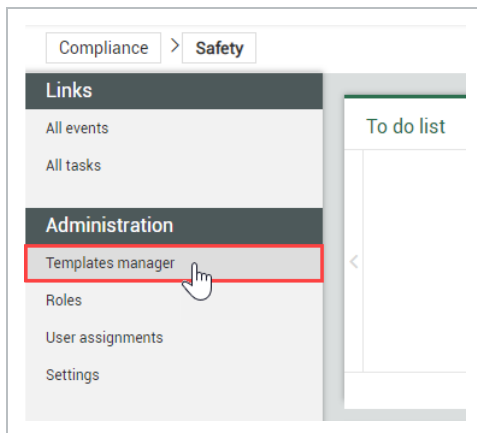
1. From the Project home landing page, select **Compliance** from the left navigation menu.



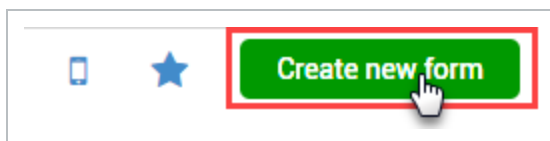
2. Select the **Safety** module.



3. Select **Templates manager** from the side menu.



4. From the Templates Manager page, select **Create new form**.



5. On the Create a form dialog box, type **Project Manager Safety Walk** in the Form name field.
6. For Category association, select an appropriate item from the drop-down list.
7. Under Available on mobile, switch to the **green check mark** to indicate it will be available on a mobile device.
8. Change Event title and Event date to **User defined**.

TIP

Selecting **User defined** allows the user to add a future or past date. If you want to control this, consider the option to use.

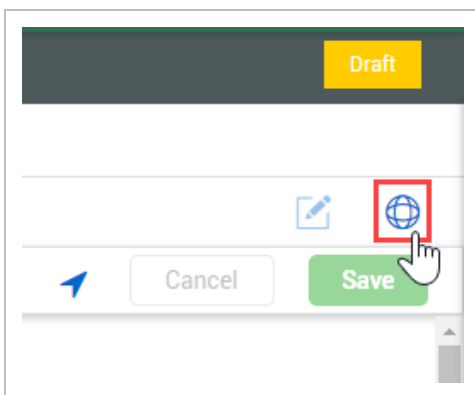
9. For Organization association, select the check box for the highest organization level to make the template available for the entire association.
10. Click **Create**. The Form builder opens with a section already created and Event title and Event date already populated on the form.

4.2 Step by Step 2 — Build a Template Task

1. Select the **Safety** module.
2. Select **Templates manager** from the side menu.
3. Select the **Tasks** item type in the upper-left.

4. From the Templates manager page, select **Create new task**.
5. Add a Description if needed. On the Create a new task dialog box, type **Finalize Safety Walk Process** in the Task name field.
6. For Category association, select an appropriate item from the drop-down list.
7. Under Available on mobile, switch to the **green check mark** to indicate it will be available on a mobile device.
8. Set Task title to **System Default**.

- The Due date field provides a mandatory date question on the template where the user can provide a date that will become the due date
9. Select the **Add expiration date** check box.
 10. For Organization association, select the check box for the highest organization level to make the template available for the entire association.
 11. Select the **+ Future Children** button.
 12. Click **Create**.
 - The Task builder opens in the appropriate Category, in a section already created and with Description, Responsible party, Due date and Assign fields already populated on the task
 13. In the Description field, change the Question text to **Identify steps in the process**.
 14. Change the Assign button text to become **Assigned**, keeping the status as Scheduled.
 15. Click **Save**.
 16. Click the **Publish** icon.

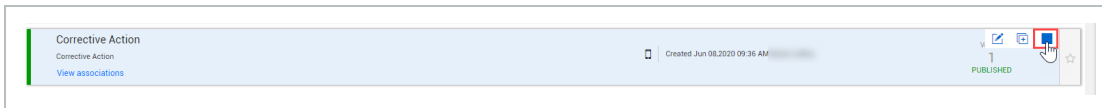


4.2.2 Activate, Deactivate, and Copy Published Tasks and Forms

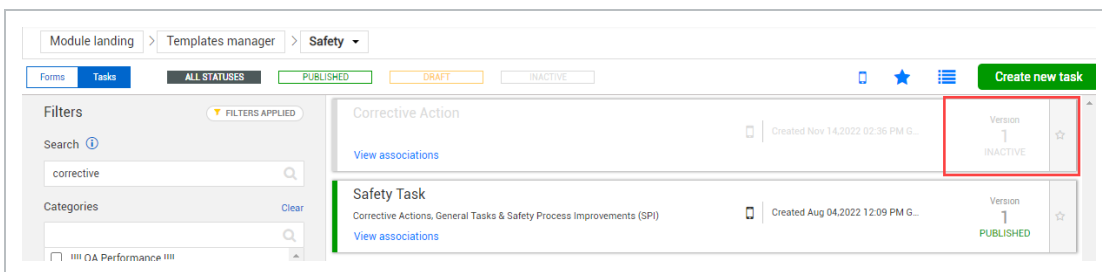
Both tasks and forms can be deactivated, reactivated, and copied after being published. The following step-by-steps use a specific task to walk through the processes.

4.2 Step by Step 3 — Deactivate a Task

1. From the Templates manager, hover your cursor over your desired published task.
2. Click the **Deactivate** icon.



- The task remains visible in the Templates manager, but shows as Inactive in the Status column.



4.2 Step by Step 4 — Activate a Task

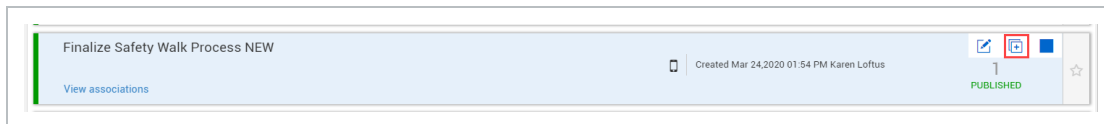
1. From the Templates manager, locate your desired inactive task.
2. Select the check box to the left of the ID.
 - After being clicked, two additional icons are shown: Activate and Delete tasks
3. Click the **Activate** icon.



- The task is shown in Draft mode in the Status column

4.2 Step by Step 5 — Copy a Published Task

1. From the Templates manager, locate a published task.
2. In Tile view, hover over the task. On the right side of the tile, three icons are available: Edit, Copy, and Deactivate tasks.
3. Click the **Copy task** icon.



4. In the dialog box, edit all fields.

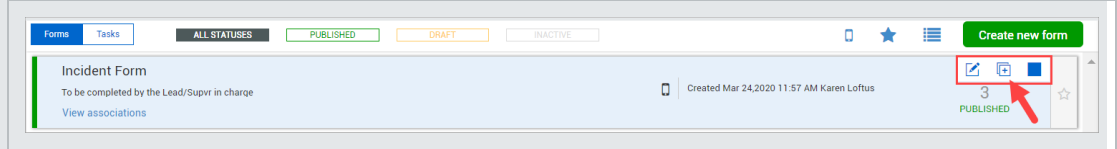
A screenshot of the "Copy a task" dialog box. The dialog box has a title bar with a close button (X). It contains several fields and sections:

- Task name:** A text input field containing "Finalize Safety Walk Process NEW".
- Description:** A text input field.
- Category association:** A section with a dropdown menu showing "Incidents" and a close button (X). Below it, a small text says "Select categories you want to associate to your tasks".
- Available on mobile?:** A toggle switch that is currently turned on (green checkmark).
- Task title:** A dropdown menu showing "System default" with an information icon (i).
- Organization association:** A section with a search bar and a list of organizations. The first organization is "S100000 - PKS Inc" with a green button next to it that says "+ Future Children". Below the list, a small text says "Select organizations you want to be able to perform this task".
- Buttons:** At the bottom right, there are two buttons: "Cancel" and "Copy".

5. After all fields are filled out, the Copy button change colors. Click **Copy**. The Task builder opens for further edits.
6. **Save** if edits are made, and then click the **Publish** icon.
7. After being published, the Templates manager opens with the copied task shown.

NOTE

The process is the same for copying, activating, and deactivating a form.



4.2.3 Form and Task Builder – Build Tab

The form builder and task builder consist of the following tabs:

- Build
- Properties
- Form flows (forms only)
- History

This section focuses on the Build tab.

Overview - Form and Task Builder: Build Tab

	Title	Description
1	Layout types	Drag and drop columns and sections onto your form or task.
2	Question types	Drag and drop attachments, buttons, dates, times, form buttons, form flows, GPS, integrated lists, references, lists, numbers, people, signatures, and text fields to your form or task.
3	Building area	The blank area you drag your sections and questions onto. It represents the template you are creating.
4	Edit	For existing templates, allows you to edit the existing template.
5	Publish	When finished building the template, click this button to make the template available for use.
6	Section	Lists each section on the form or task.
7	Save	Saves the form or task in its current state. If not yet published, it is saved as a draft.

NOTE

If you click **Cancel**, all changes are deleted since your last save. The system does not automatically save.

4.2.3.1 Layout Types

Layout types let you divide your form or task into sections. Perhaps your form or task covers different topics or areas and you want to organize the form or task accordingly.

When you first drag a section onto the form or task, it creates a section that extends the width of the form or task.

You can let users copy sections when filling out a form or task. This feature lets users determine if duplicate sections are needed, instead of creating templates with duplicate sections in advance.

To let users copy a section, click the section header, and then select the **Enable copy section** check box in the side panel.

You can change the text of the button. By default, it is named Copy section.

NOTE

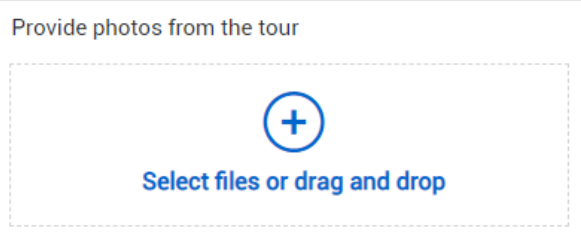
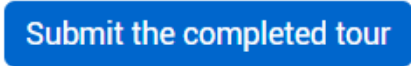
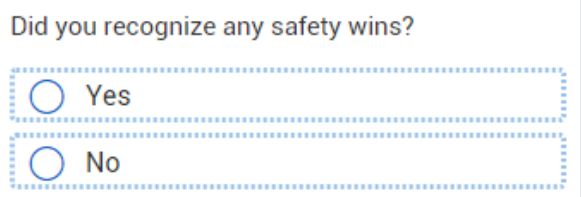
You can enable the copy section option only for sections without mandatory questions, form buttons, or associated tasks.

4.2.3.2 Question Types

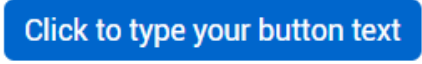
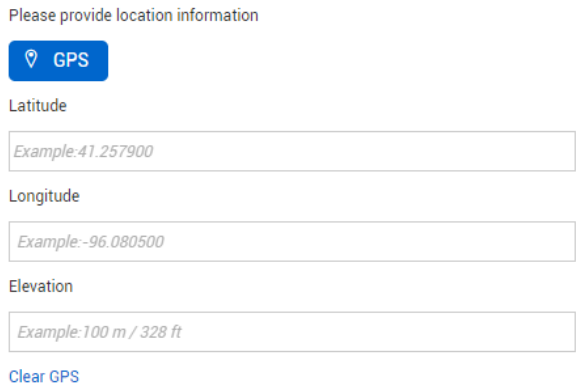
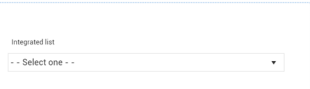
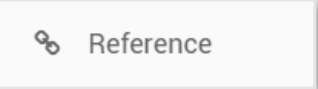
In the sections you create, you have different types of questions you can drag onto your form or task.

The following is a brief overview of each question type and its key characteristics.

Overview – Question Types

Question Type	Image	Description
Attachment		Enables an attachment (for example, photos, documents) to be added to the form or task. You can include additional text with this question if needed (for example, for instructions.) Attachments can be marked as Mandatory. If integration with InEight Document is set up, attachments can be supporting documents from the Document application.
Button		Adds a button to the form or task. You can set the button to close and/or change the status of the form or task. The button type can also be marked as single-use or multi-use. Buttons can be marked as Mandatory.
Choice		Adds a question with two options. Settings include icons and predefined text answers (e.g., yes/no, pass/fail, and accept/reject) or you can customize your own. Choices can be marked as mandatory. You can mark answers as exceptions.
Date - Time	<i>Click to type your question</i> 	Adds a field to fill out either date and time, just the date, or just the time. Dates can be marked as Mandatory.

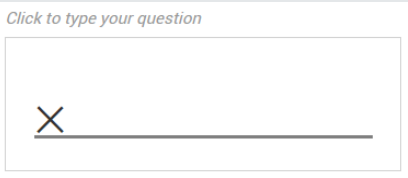
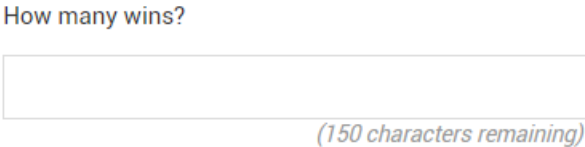
Overview – Question Types (continued)

Question Type	Image	Description
Form Button		Adds a button that opens another template from within your form or task. It can be designated as single-use or multi-use. Form buttons can be marked as Mandatory. You can set this button to change the form or task's status when it is clicked. Status change does not affect the form or task that is opened by the button.
Form Flow Button		Adds a button that facilitates a specific step in a form flow. Form flow buttons can also go back to a previous step.
GPS		Lets users enter their location coordinates. Coordinates can be entered manually or by clicking the button.
Integrated list		Adds the integrated list question type to your form that integrates with InEight Platform Master data list resources.
Reference		Adds a supporting document attachment, event or task, or a hyperlink to other pertinent information. References cannot

Overview – Question Types (continued)

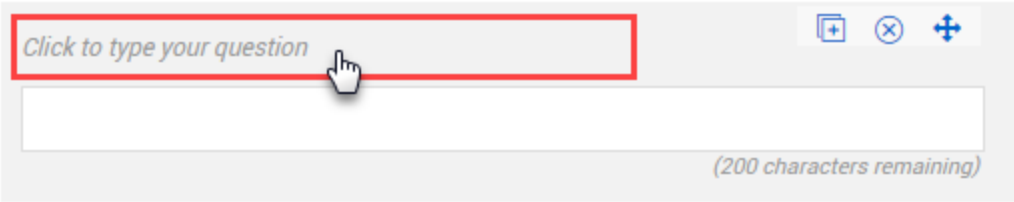
Question Type	Image	Description
		be marked as Mandatory.
List	Indicate the quality of this section ☐ Very Good ☐ Good ☐ Fair ☐ Poor ☐ Very Poor	Adds a multiple-choice question to the form or task. Answer options include radio buttons, check boxes, drop-down lists, or multi-level drop-down lists. You can select answers from predefined lists or create your own. Lists can be marked as Mandatory. You can set default values for radio buttons, check boxes, and drop-down lists. Default values are selected when a user opens a form or task and requires the user to manually select a different value. You can mark answers as exceptions. For more information about multilevel drop-down lists, see Multilevel Drop-Down Lists.
Number	How many widgets were fastened?	Adds a question that requires a numerical answer to the form or task. The number can be formatted to be currency, decimal, \$, %, or phone number. Numbers can be marked as Mandatory.
People Picker	Who led the tour?	Adds a question that must be answered by selecting users from the drop-down list. People pickers can be marked as Mandatory. You can let end users

Overview – Question Types (continued)

Question Type	Image	Description
		select multiple users or none. You can also select whether end users can choose from only assigned users, who have a Compliance role, or all project-level operational resource, which includes users who do not have Compliance roles. You can also show users' employee IDs with their names and set up an email to send when a user is selected. Operational resources are managed in project home page > Assigned operational resources.
Signature		Adds a signature block to the form or task. Signatures can be marked as Mandatory.
Text		Adds a question that requires text for the answer. The field can be short or long text, or you can use this question type to only be a label with no text field. Text can be marked as Mandatory.

4.2.3.3 Question Settings

After a question is added, you can click the question in the section.



A slide-out panel is shown on the left. You can type your question and define the settings related to the question. As you type the question, the question populates into your template.

The screenshot illustrates the question builder interface. On the left, a slide-out panel titled '* Question text' contains a text input field with the placeholder 'Location of Safety Tour' and the instruction 'Type your question'. Below this, the 'Type' section offers three radio button options: 'Short' (selected), 'Long', and 'Label only', followed by an information icon. At the bottom of the panel is a 'Supporting text' field with an information icon. On the right, a template preview shows a light blue 'SECTION HEADER' box. Below it, a dashed-line box contains the text 'Location of Safety Tour'. A red arrow points from the input field in the slide-out panel to the text in the template preview. A red rectangle highlights the text in the template, and a hand cursor icon is positioned over it.

TIP

You can also click on the text within the question type on the form or task and it will enter the text on the slide-out panel.

All question settings include the option to make the question mandatory. This means the person filling out the form or task is not able to submit the form or task until the question is answered.

You can mark responses to list and choice questions as exceptions. This feature is useful to indicate responses that are undesired or outside of normal business processes in some way and have those exceptions show in reporting. To set a response as an exception in the form or task builder, select a response to a list or choice question. In the Details side panel, select the **Exception** check box. An Exception icon is added to the right of the response. This icon is visible only in the builder.

The screenshot displays the 'Form builder' interface. On the left, a sidebar contains a 'Details' panel with the following options: 'Option text' (set to 'No'), 'Add supporting text', 'Exception' (checked and highlighted with a red box), 'Logic', and 'Email'. The main area shows a form template with a 'SECTION' header. Below the header, there are three input fields: a text input for '* Where is the safety walk being performed?' (with a '(250 characters remaining)' hint), a date input for '* Event date' (set to '05/31/2022'), and a choice question 'Is PPE being worn correctly?' with radio buttons for 'Yes' and 'No' (the 'No' option is selected and highlighted with a red box). The interface includes a 'Cancel' button and a 'Save' button at the top right.

4.2.3.4 Access

Settings for each question and section also include an Access section with a Manage access button. In the Manage access dialog box, you can control which users or roles can view or answer each individual question or entire sections when filling out the form or task. If they do not have access, they do not see the question on the form or task.

View and edit permissions are set separately from each other. You can manage access for all sections and questions in a template in the dialog box. It does not matter which section you choose when you click the **Manage access** button.

To control who can see data in reports on question responses, add reporting tags in the Access section. Users with the same reporting tags that you set here are able to see this data when using reports.

4.2.3.5 Logic

The Logic setting lets you show or hide a question based on the response from another question on the form or task. For example, you are creating template for a safety tour, and have added the Choice question "Did you recognize any safety wins?"

Did you recognize any safety wins?

☐ Yes

☒ No

Following this question, you add a Text question for them to indicate the wins they had, but you only want this question to show up if they answered yes to the previous question (did you recognize any safety wins?).

Under the Logic section of the Text question’s properties, you select **Leading questions**.

* Question text

Safety wins: explanation

Type your question

Type

☒ Short ☐ Long ☐ Label only i

Supporting text i

☐ Mandatory

Access v

Logic ^

⚙ Defining conditional logic rules allows you to show or hide questions based on another questions response.

➔ Leading questions

i

Integration tag i

Location of Safety Tour

(2)

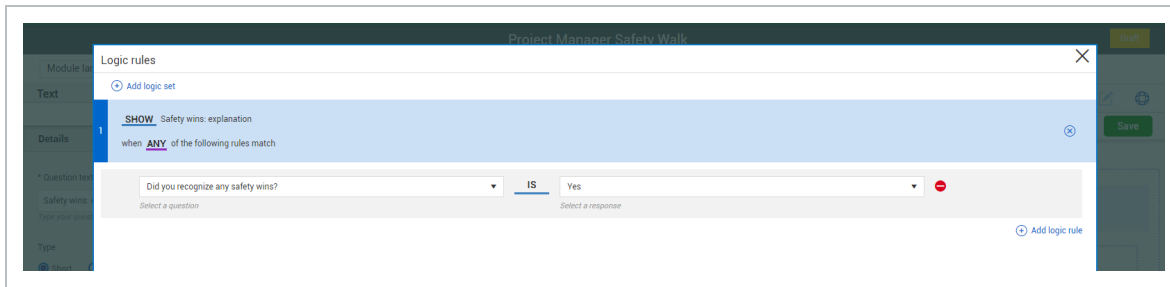
Did you recognize any safety wins?

☒ Yes

☐ No

Safety wins: explanation

A Leading questions dialog box opens, where you set the Text question to show when the user answers Yes to the “Did you recognize any safety wins?” question.

**TIP**

Depending on the form or task, you can show or hide the question depending on how the other question is answered.

TIP

If there is a form flow button that can be reversed, you can apply separate leading logic sets to the reverse form flow button and the form flow button that advances to the next step.

4.2.3.6 Classifications

You can use classifications to apply logic at a section level to show the section only if that classification is chosen on a question somewhere else in the template. Using classifications to drive logic means you do not need to apply logic to every question in the section you want to hide. Classifications also let you sort and filter in the Events and Tasks lists.

The following steps show how to use classification logic to show a section based on a question response.

4.2 Step by Step 6 — Show a Section using Classification Logic

1. Select an option of a List question.
2. In the Details side panel, open the Logic section, and then select at least one classification from the drop-down list.

3. Click the section you want to show.
4. In the Details side panel, open the Logic section, and then select the classification from the drop-down list.

4.2.3.7 Copying, Deleting and Moving Questions

When hovering over a question on your template, three options are shown:

- Copy creates a duplicate question in the same section.
- Delete removes the question from the template.
- Move lets you drag and drop the question to a different area on your template.

TIP

You can move questions by clicking and holding anywhere on the question and dragging it into place.

4.2.3.8 Using the Form and Task Builder – Build Tab

The following Step by Steps walk you through building out a template using the Task builder and Form builder.

4.2 Step by Step 7 — Build a Template Using the Task Builder

1. From the Task builder page of the **Finalize Safety Walk Process** template you created in the previous Step by Step, confirm your form mirrors this design:

2. Drag and drop the **People Picker** question type into the existing section underneath the Due date question.
3. Click on the question and type **Name of person conducting the next Safety Walk** in the Question text field.
4. Select the Mandatory **check box**.
5. Click the **People Picker X** to close the settings slide-out panel.
6. Drag and drop the **Date - Time** question type to the right edge of the Name of person conducting the next Safety Walk question, so it becomes a second column on the same row.
7. Make the title of the Date-Time field, **Date of upcoming Safety Walk**.

8. On the Details panel, change the Type to **Date** so the answer selection will only be for a date, not a time.
9. Close the settings slide-out panel.
10. Click the **Assigned** button and notice the “Close task upon the button selection” is selected and grayed out. Ensure that Change status to is **Scheduled**.
11. In the upper-right corner, click **Save** to save your new template task. A notification is shown indicating the time the change was saved.
12. To make the template available for use, click the **Publish** icon.

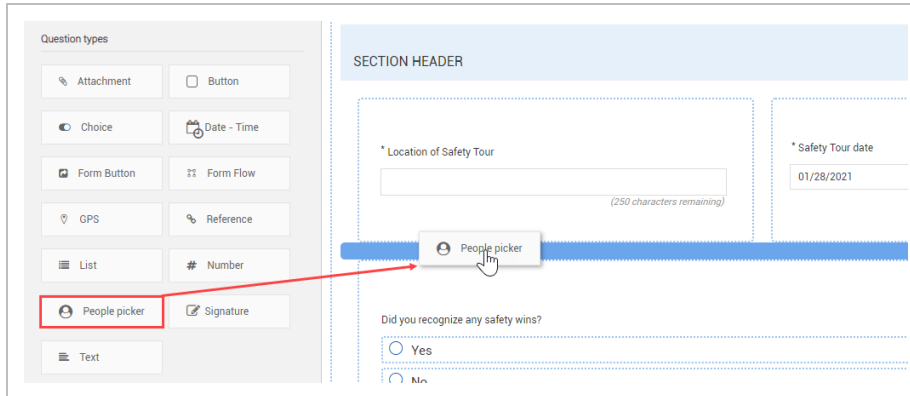
4.2 Step by Step 8 — Build a Template Using the Form Builder

1. From the Form builder page of the Project Manager Safety Walk template you created in the previous Step by Step, confirm your form mirrors this design:

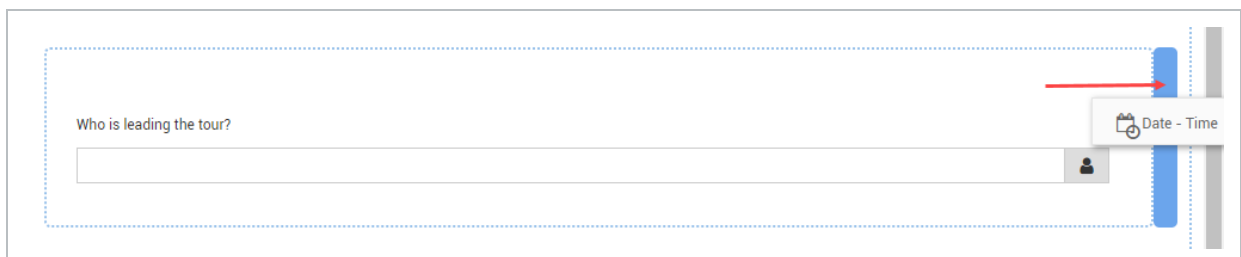
The screenshot displays a form builder interface with a dashed blue border. At the top, a light blue bar contains the text "SECTION HEADER". Below this, the form is divided into several sections:

- Location of Safety Tour:** A text input field with a placeholder "(200 characters remaining)".
- Safety Tour date:** A date input field showing "03/24/2020" with a calendar icon to its right.
- Did you recognize any safety wins?:** A question followed by two radio button options: "Yes" and "No".
- Safety wins: explanation:** A large text area with a placeholder "(4000 characters remaining)".

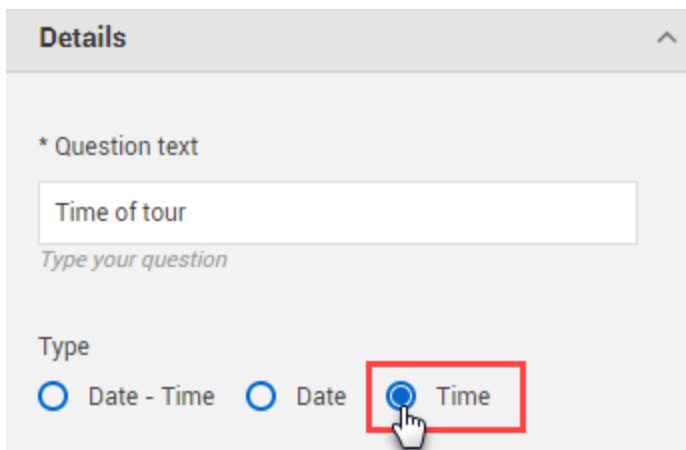
2. As needed, close a settings slide-out panel.
3. Drag and drop the **People Picker** question type into the existing section underneath the Location and Date questions.



4. Click on the question and type **Who is leading the tour?** in the Question text field.
5. Close the People Picker settings slide-out panel.
6. Drag and drop the **Date - Time** question type to the right edge of the "Who is leading the tour" question, so it becomes a second column on the same row.



7. Click on the Date - Time question and type **Time of tour** in the Question text field.
8. Under Type, select **Time** so the answer selection will only be for a time, not a date.



Details

* Question text

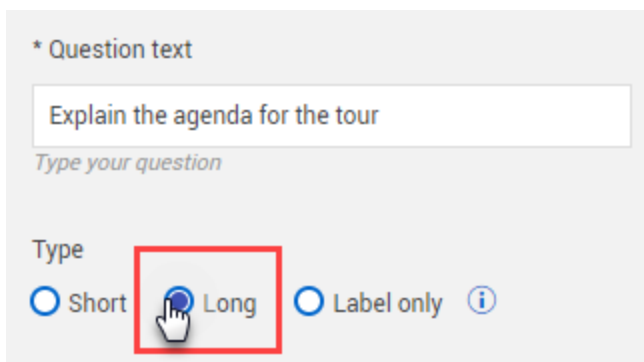
Time of tour

Type your question

Type

☐ Date - Time ☐ Date ☒ Time

9. Close the **Date - Time** settings slide-out panel.
10. Drag and drop the **Text** question below these two questions.
11. Click on the question and type **Explain the agenda for the tour** in the Question text field.
12. Under Type, select **Long** so the user has more room (4000 characters) to enter a response when filling out the form.



* Question text

Explain the agenda for the tour

Type your question

Type

☐ Short ☒ Long ☐ Label only ⓘ

13. Close the **Text** settings slide-out panel.
14. Drag and drop the **Choice** question type into the existing section underneath the agenda question.
15. Click on the question and type **Did you find any unsafe items?** in the Question text field.
16. Under Predefined lists, select **Yes/No** from the drop-down list.

17. Select the **Mandatory** check box.

18. Close the **Choice** settings slide-out panel.
19. Drag and drop the **Text** question type into the existing section underneath the safety win question.
20. Click on the question and type **Explain the unsafe items** in the Question text field.
21. Under Type, select **Long**. You want to only show this question if the user answered **Yes** to the previous question (Did you find any unsafe items?).
22. Expand the **Logic** section and select **Leading questions**.

Details

* Question text 1
 Explain the unsafe items
Type your question

Type
☐ Short ☒ Long ☐ Label only 2

Supporting text 3

☐ Mandatory

Access ▼

Logic ^

⚙️ Defining conditional logic rules allows you to show or hide questions based on another questions response.

➕ Leading questions 3

Integration tag ?

- The Logic rules dialog box is shown

Project Manager Safety Walk

Logic rules

+ Add logic set

SHOW Explain the unsafe items

when **ANY** of the following rules match

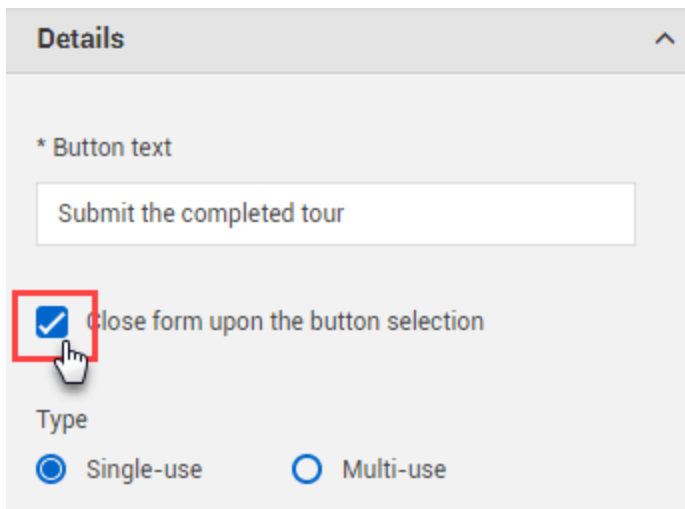
Were there any unsafe items? ▼ **IS** Yes ▼ ⊖

Select a question Select a response

+ Add logic rule

23. Switch the Show/Hide toggle to **Show**.
24. From the Select a question drop-down list, select **Did you find any unsafe items?**.
25. From the Select a response drop-down list, select **Yes**.
26. Click **Save** to close the Logic rules dialog box.
27. Close the **Text** settings slide-out panel.

- The "Explain the unsafe items" question now only shows if the user answers **Yes** to the "Did you find any unsafe items?" question
28. Drag and drop the **Attachment** question type into the existing section underneath the existing questions.
 29. Click on the question and type **Provide photos from the tour** in the Question text field.
 30. Close the **Attachment** settings slide-out panel.
 31. Drag and drop the **Button** question type into the existing section underneath the existing questions.
 32. Click on the question and type **Submit the completed tour** in the Button text field.
 33. Select the **close the form upon the button selection** box.



Details

* Button text

Submit the completed tour

☒ Close form upon the button selection

Type

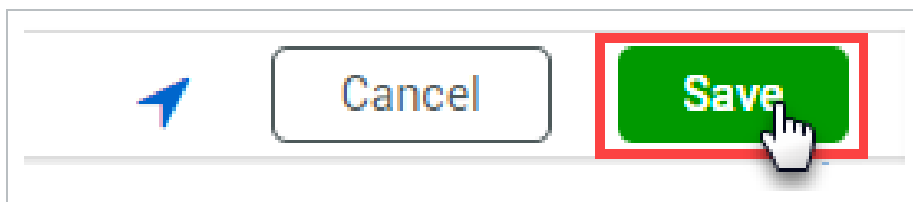
☒ Single-use ☐ Multi-use

34. Under Change status to, select **Complete** from the drop-down list.
35. Expand the Email section, and select **Add email**.
36. From the dialog box, add a Subject line such as **"Tour has been completed"**; select role and/or user; and add content to the body of the email such as **"Please review at your convenience."** Select the **@Reporter** if desired.



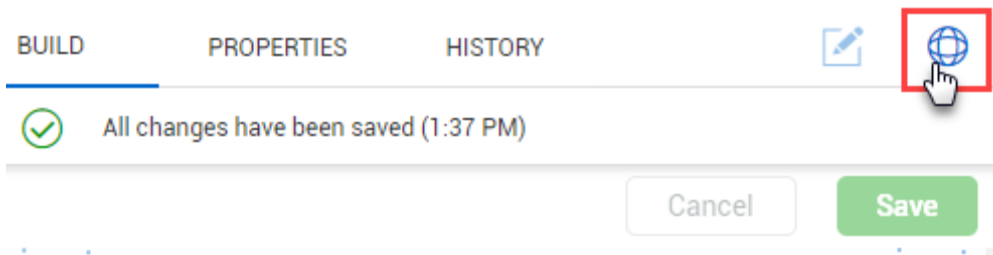
37. Click **Save**.

38. In the upper-right corner, click **Save** to save your new template form.



- A dialog box is shown indicating the time the change was saved.

39. To make the template available for use, click the **Publish** icon.



Multi-Level Drop-Down Lists

Using the **List** question type, you can build branching questions using a multilevel drop-down list. For more information about multilevel drop-down lists, see [Multilevel Drop-Down Lists](#).

Referenced Forms and Tasks

When you create a task or an event from another task or event, you see the referenced item in both associated tasks or events, letting you see which events and tasks are associated. For more information, see [Referenced Forms and Tasks](#).

4.3 MULTILEVEL DROP-DOWN LISTS

Using the List question type, you can build branching questions using a multilevel drop-down list. When you make a selection from a list of question options, your response branches off to another question. This functionality helps you manage list items better for greater control of data in the database.

A multilevel drop-down list can be nested at several levels. For example, this type can be useful for showing a complicated organizational structure.

In the List side panel, there are options to make features of a multilevel drop-down list mandatory:

- **Mandatory** – The multilevel drop-down list question must be answered.
- **Mandatory terminal response** – The user must go all the way to the last level of the list to make a selection, instead of just clicking through without expanding the list beyond the first level. If you select this option, you cannot select Mandatory required level.
- **Mandatory required level** – You must select a mandatory required level from a drop-down list that determines how many levels down users must expand the list to make a selection, instead of clicking through without expanding the list beyond the first level. If you select this option, you cannot select Mandatory terminal response.

If you click **Manage list options**, the List options dialog box lets you organize list options manually or through Excel import.

In the dialog box, there are buttons to add and remove options, as well as move them up and down in the list, and in and out of other options to create a hierarchy.

List options

Import

Drag and drop the file here or browse

[Browse](#)

File must not exceed 5 MB

[Download multi-level list starter template](#)

List

☐	List options
☐	Option1
☐	Option2
☐	Option3

[Cancel](#) [Save](#)

NOTE

There can be up to a maximum of 10,000 items in the complete list, including all items in the levels.

4.3 Step by Step 1 — Add a manual multilevel list question

1. In a form, drag the **List** question type onto the form or task.
2. In the Question text field, type in the question.
3. In the Type drop-down list, select the **Multi-level drop-down** option.

TIP

When a check box to the left of an option is selected, the up and down arrows are shown to let you move that question response up or down in the listing.

NOTE

If available, indenting can be done with the **Move List in to** and **Move List Out of** arrows.

Add list option and **Delete list option** icons are available for you to use.

4. Select the check box of the second list item, and then select the indent or the **Move list option in to** icon.
 - That option now falls below, or within, the item above it.
5. Unselect the second list item.
6. Select the third list item.

7. Indent the third list option using the **Move list option in to** icon.

- Your List option dialog box should look similar to this example:

The screenshot shows a dialog box titled "List". At the top, there is a toolbar with icons for adding (+), moving up (↑), moving down (↓), moving right (→), moving left (←), and deleting (×). Below the toolbar is a table with a checkbox in the first column and text in the second column. The first row is highlighted in grey and contains a collapsed icon (≡) and the text "List options". The second row contains a collapsed icon (∨) and the text "Yes". The third row contains a checkbox and the text "Yes, absolutely". The fourth row contains a checkbox and the text "Yes, but with concern". A vertical scrollbar is on the right side of the table.

☐	≡ List options
☐	∨ Yes
☐	Yes, absolutely
☐	Yes, but with concern

8. Add three more list options, using the **Add List Item** icon.

9. With the final two items, use the **Move list option in to** icon to indent them.

- Your List option dialog box should look similar to this example:

The screenshot shows the same "List" dialog box as before, but with three additional rows added to the table. The fifth row contains a collapsed icon (∨) and the text "No". The sixth row contains a checkbox and the text "No, though I have a question". The seventh row contains a checkbox and the text "No, no questions asked". The vertical scrollbar on the right is now at the bottom of the table.

☐	≡ List options
☐	∨ Yes
☐	Yes, absolutely
☐	Yes, but with concern
☐	∨ No
☐	No, though I have a question
☐	No, no questions asked

10. Click **Save**.

11. Click **Publish**.

- As a result, when the form or task is opened, the first question can be answered, which then leads to branched options for the second question.

Are you comfortable with this change?

Yes

Home (Root)

Yes

No

Cancel Save

Are you comfortable with this change?

Yes / Yes, but with concern

< Back Yes

Yes, but with concern

Yes, absolutely

Cancel Save

To create a multilevel drop-down question using the template from Excel, first click the **Download multi-level list starter template**. The template has one Example sheet with instructions on how to use it. You can then fill out the Import sheet with list options for as many levels as necessary.

This step-by-step walks you through adding items through the multilevel list start template.

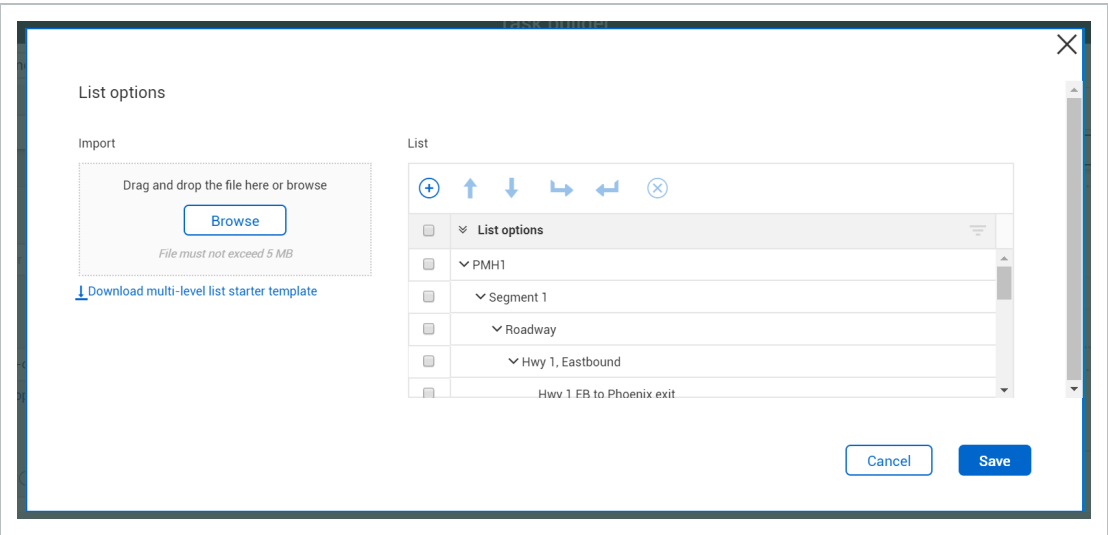
4.3 Step by Step 2 — Add a multilevel list using the list starter template

1. In a form, drag the **List** question type onto the form or task.
2. In the Question text field, type in the question.
3. In the Type drop-down list, select the **Multi-level drop-down** option.
4. Click on **Manage List Options**.
5. Click the **Download multi-level list starter template**. The Excel file downloads.
6. Click **Enable Editing** if needed.

7. **Save the template file** to your desired location.
 - There are two tabs, the Example tab, and Import, the latter of which you use to create your multilevel branching template.
8. Open the **Import** tab.
9. Create a **Level 1** item in Column A, PMH1 in the example.
10. In Column B, create the **Level 2** item, Segment 1 in the example.
11. In Column C, create the **Level 3** items, or decision points, Roadway, Structure, and Walls in the example.
 - This means that when a user selects a Column B segment, they will have three additional choices from Column C in the next drop-down list
12. In column D, add **Level 4** options.
 - In the example shown, there are only Level 5 options in Column E for Hwy 1, Eastbound and Hwy 1, Westbound

	A	B	C	D	E
1	Level 1	Level 2	Level 3	Level 4	Level 5
2	PMH1				
3	PMH1	Segment 1			
4	PMH1	Segment 1	Roadway		
5	PMH1	Segment 1	Roadway	Hwy 1, Eastbound	
6	PMH1	Segment 1	Roadway	Hwy 1, Eastbound	Hwy 1 EB to Phoenix exit
7	PMH1	Segment 1	Roadway	Hwy 1, Eastbound	Hwy 1 EB to Central Ave
8	PMH1	Segment 1	Roadway	Hwy 1, Westbound	
9	PMH1	Segment 1	Roadway	Hwy 1, Westbound	Hwy 1 WB to 101
10	PMH1	Segment 1	Roadway	Hwy 1, Westbound	Hwy 1 WB to Scottsdale Rd
11	PMH1	Segment 1	Structure Segment 1		
12	PMH1	Segment 1	Structure Segment 1	1st Ave	
13	PMH1	Segment 1	Structure Segment 1	TUC #2 overpass	
14	PMH1	Segment 1	Structure Segment 1	101 WB overpass	
15	PMH1	Segment 1	Walls Segment 1		
16	PMH1	Segment 1	Walls Segment 1	TUC A0	
17	PMH1	Segment 1	Walls Segment 1	TUC A1	

13. **Save** the Excel file.
14. Go to Compliance, and then click **Browse**.
15. Navigate to the folder where your Excel file is located.
16. Select the file, and then click **Open**.
17. The Excel data populates. Click **Save**.

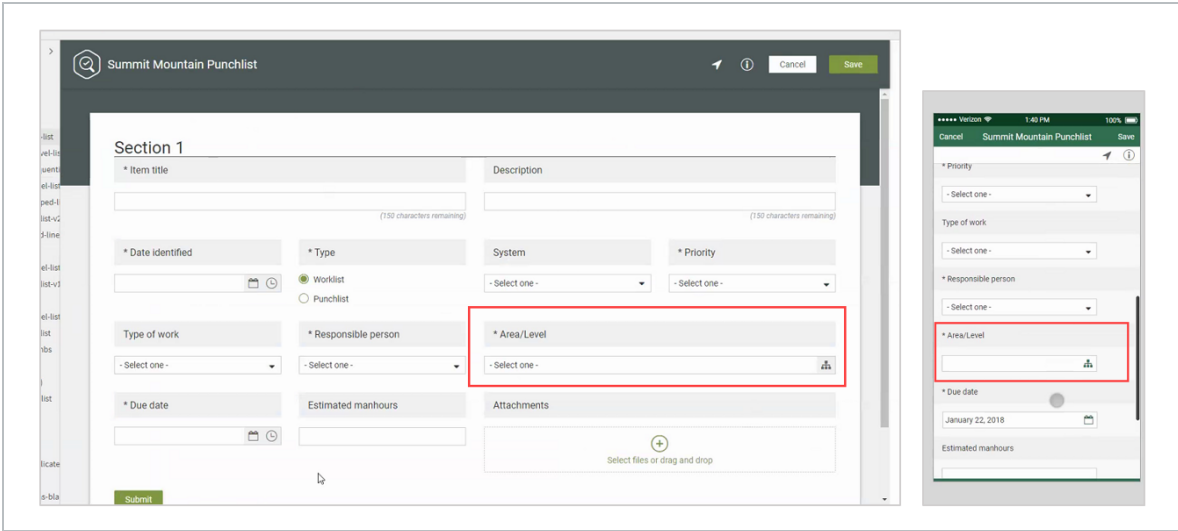


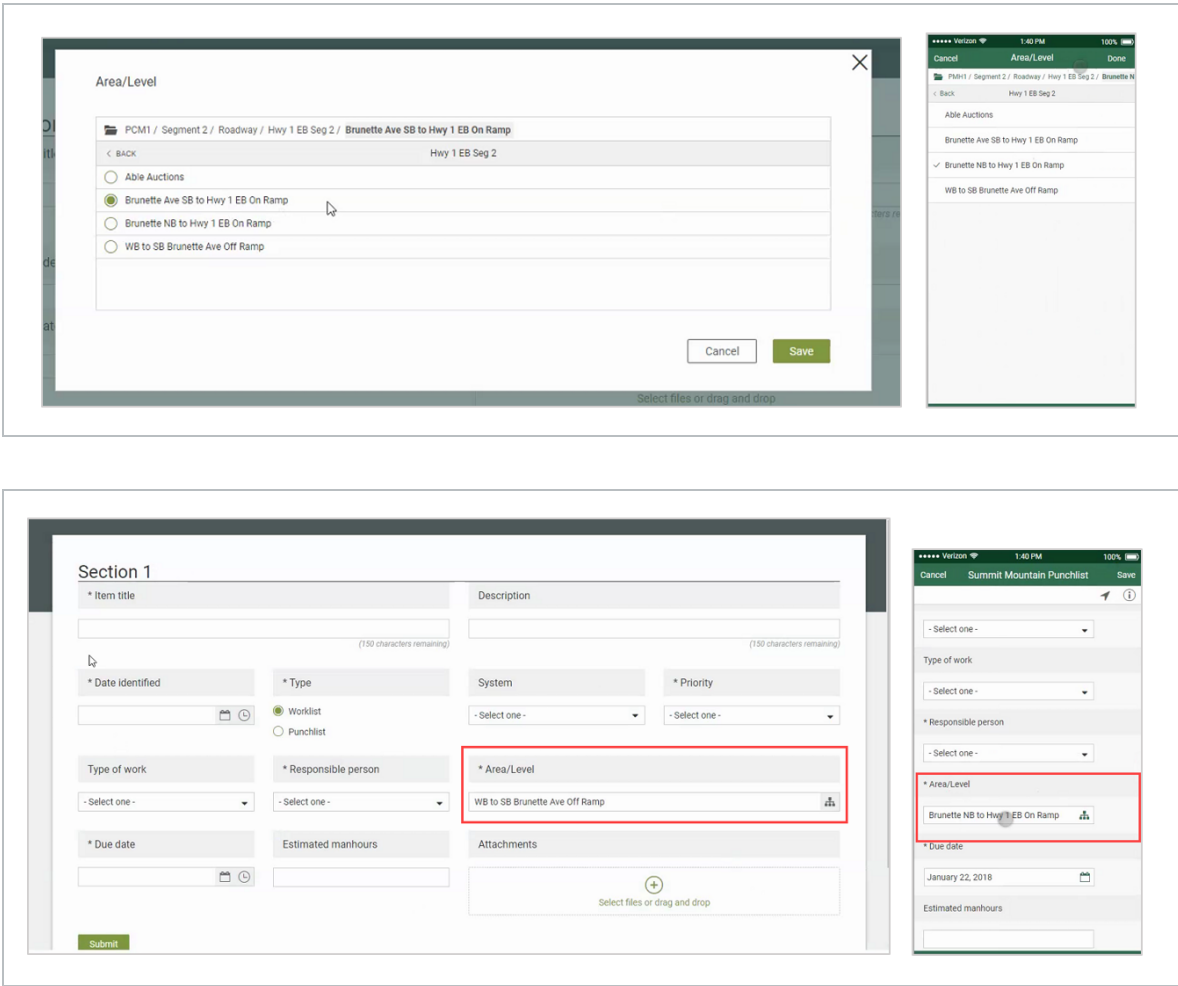
TIP There are no limits on how many levels can be added. Many levels down might not be the best when using the list.

TIP There is a maximum of 10,000 items in the complete list including all items in the levels.

TIP There is a maximum of 200 characters, including spaces, for each item. Items that exceed 200 characters are truncated.

In a form, a multilevel list option looks similar in either the web or mobile versions:





4.4 REFERENCED FORMS AND TASKS

When you create a task or an event from another task or event, you see the referenced item in both associated tasks or events, letting you see which events and tasks are associated.

When you create a new event, you can select the **Associate Task** check box.

The screenshot shows the 'Form builder' interface. On the left, the 'Details' panel is expanded, showing the 'Label' field with the text 'SECTION HEADER'. Below it, the 'Associate task' checkbox is checked and highlighted with a red box. The 'Supporting text' field is empty. On the right, the 'Section' header area is visible, showing the 'SECTION HEADER' label and a text input field for 'Location of Safety Tour' with a character count of '(250 characters remaining)'.

When you do that, two things occur. First, the Task Button is shown, in this case in the Section Header. Second, a number of changes in the Details panel occur, including:

- The Task Button Text area shows up where you can modify the name of the button
- The Type lets you choose from Single-Use or Multi-use
- The Template to Open Upon Button Selection drop-down list requires you to select a Task template
- And the Associated Categories drop-down list requires a selection

The screenshot shows the 'Form builder' interface with the 'Details' panel on the left and the 'Section' header area on the right. The 'Details' panel shows the 'Label' field with 'SECTION HEADER', the 'Associate task' checkbox checked, and the 'Task button text' field with the text 'Task button'. The 'Type' is set to 'Multi-use'. The 'Template to open upon button selection' is set to 'Corrective Action'. The 'Associated categories' is set to 'Inspections'. The 'Section' header area shows the 'SECTION HEADER' label and a 'Task button' button. A red arrow points from the 'Task button' label in the Details panel to the 'Task button' button in the Section header area. The 'Task button' button is highlighted with a red box and a circled '1'. The 'Task button text' field in the Details panel is highlighted with a red box and a circled '2'.

After any other changes are made, select **Save**.

TIP

You are also able to start a task from the Section area of an event, not just a question, which is useful for reporting purposes.

4.5 INTEGRATED LIST

4.5.1 Summary

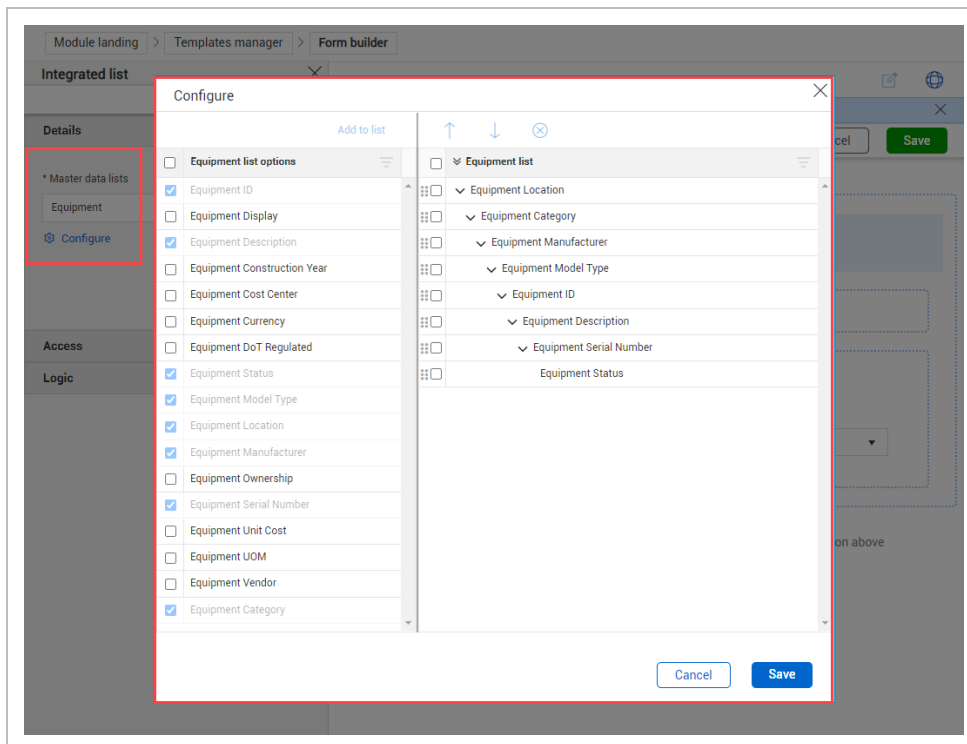
When building your template form, the Integrated list question lets you build lists that integrate with InEight Platform master data library. The Integrated list question lets you add resource column fields in a series of cascading questions. You can use cascading questions to narrow down the selection of a resource. For example, you can add Vendor Region, Vendor Country, and Vendor City column fields of cascading questions to narrow the selection down to a city. The list pulls data from Platform's resources in Main menu > **Master data library**.

NOTE

Currently, the Integrated list feature is only available for Operational resources equipment and Vendors master data.

After you add the integrated list question, select the question, and then click the **Configure** button to choose from your selected resource's column headings to add to the list.

The series of selected column headings fields show as a hierarchy and can be modified in any order.



After saving your integrated list configuration, each column heading option in the hierarchy shows as a series of cascading questions in your template form. You can add multiple series of lists to your integrated list.

The screenshot displays the 'Form builder' interface. On the left, a 'Layout types' panel shows 'Column' and 'Section' options. Below it, a 'Question types' panel lists various form elements: Attachment, Button, Choice, Date - Time, Form Button, Form Flow, GPS, Integrated list, Reference, List, Number, People picker, Signature, and Text. The main workspace shows a 'SECTION' header with a grid of eight dropdown questions, each with a 'Select one' option and a label (Equipment 1-1 through Equipment 1-8). A red box highlights this grid. At the bottom, a note reads: 'Add fields to your form by dragging types from the left panel to the blank section above'. The top navigation bar includes 'Module landing', 'Templates manager', and 'Form builder'. The top right has 'Cancel' and 'Save' buttons.

4.5.2 Steps

To add and configure an integrated list:

1. In a new or unpublished form, drag the **Integrated list** question into the form.
2. Click the Integrated list question.
3. In the left slide-out panel, select from the **Master data lists** drop-down resources.
4. Click the **Configure** icon, and then select the fields to add to the list.
5. Click **Add to list**.

Each field becomes a drop-down question in the form or task template and shows in a cascading manner. You can use the **Move up** and **Move down** arrows to modify the columns in a logical order according to your business process.

6. Click **Save**.

You can reorder, add, and delete from your list by clicking on any of the list column attributes, and then clicking **Configure**.

4.5.3 Related links

InEight Platform [Master Data Libraries](#)

4.6 TEMPLATE PROPERTIES

On the appropriate Form builder or Task builder page, the Properties tab contains the basic information entered when the form was created (on the Create a form or Create a task dialog box). This includes a header section containing the following:

- Form or Task ID (this is automatically assigned when the form or task is created)
- Version
- Status
- Module
- Creation date
- Creation time
- Created by

Order Safety Item

Module landing > Templates manager > Form builder

BUILD PROPERTIES FORM FLOWS HISTORY

Actions

Cancel Save

Properties

Form ID	Version	Status	Module	Creation date	Creation time	Created by
15	7	Draft	Safety	05/26/2021	10:02 AM	

Form name
Order Safety Item

Description

Category association
JSA's

Select categories you want to associate to this form

Organization association

- ☒ C-KYZ + Future Children
 - ☒ Steel Structure Training Job
 - ☐ Steel Structure Training Job 2
 - ☒ Steel Structure Training Job 3
 - ☐ Steel Structure Partner Job
 - ☐ Training Job
 - ☐ Wards Island WWTP
 - ☒ Heavy PM Estimate
 - ☒ BMS Test (BMS Test)
- ☐ C-KYZ-ND + Future Children
- ☐ C-KYZ-SD + Future Children

Select organizations you want to be able to perform this form

The Properties tab also includes the following fields, which you can edit at any time with the right permissions:

- Form or Task name
- Description
- Category association with + Future Children functionality

- Organization association
- Options

4.6.0.1 Task and Form Builder Options

In Form builder, both the Event title and Event date fields have the option of being System defined or User defined. Both can be used strategically to personalize your form.

The screenshot shows the 'Options' configuration panel for a form. It includes the following elements:

- Available on mobile?**: A toggle switch currently turned off.
- Event title**: A dropdown menu with 'System default' selected.
- Event date**: A dropdown menu with 'System default' selected.
- Add expiration date**: An unchecked checkbox.
- Available through form button only?**: A toggle switch currently turned off.
- Integration tag**: An empty text input field.
- Enable print functionality**: A toggle switch currently turned off.

Form Builder: Event Options

	System Default	User Defined
Event title	The event title defaults to the "name of the form_event ID" and is presented on the event list as the event title.	This provides a mandatory text question on the form where the user can provide a title that is presented on the events list as the event title.
Event date	The event date defaults to the date the form was started.	This provides a mandatory date question on the form where the user can provide a date that is presented on the events list as the event date.

In Task builder, both Task title and Due date can be used strategically to personalize your task.

Task Builder: Task and Due Date Options

	System Default	User Defined
Task title	The task title defaults to the "name of the task_task ID" and is presented on the task list as the task title.	This provides a mandatory text question on the template where the user can provide a title that is presented on the task list as the task title.

Task Builder: Task and Due Date Options (continued)

	System Default	User Defined
Due date	Not applicable	This provides a mandatory date question on the template where the user can provide a date that is presented on the task list as the due date.

4.6.0.2 Expiration Date

Notice that when the Add expiration date check box is selected, the Add renewal date option is shown. Selecting Add expiration date makes this a mandatory field on the form. If selected, the Add renewal date also provides a mandatory question on the form.

Form Builder: Date Options

	Definition
Add expiration date	This selection provides a mandatory date of expiration question on the form. This question and the value show on the event list as well after the form has been filled out.
Add renewal date	This selection provides a mandatory date of renewal question on the form. This question and the value show on the event list as well after the form has been filled out.

NOTE

After the form is published, only certain fields in the properties may be changed without putting the form into a draft status.

4.6.0.3 Template Availability

To hide a template from being started as a stand-alone form or task, turn on the **Available through form button only?** toggle. When hidden, these templates can be used only through association with the Form Button.

4.6.0.4 Integration Tag

You can add an integration tag to a template to include the form in reporting. Specific questions in that form with the same integration tag are then reported on. This applies only to standard reports.

4.6.0.5 Template Integration

Template integration is helpful when you need to use a task in InEight Change. For more information about template integration, see [Template Integration](#).

4.6.0.6 Enable Print Functionality

You can enable a template to be printable from the Events or Tasks page, and from the event or task detail page.

NOTE

Pay special attention when enabling the print feature. This feature does not contain any permissions associated with the event or task. If you have access to the work item and can print it, you can print all questions and answers in the work item.

To enable a template to be printable, turn on **Enable print functionality**, and then select which report to run. Currently, only the Compliance General Forms Integration is available.

4.6.0.7 Template Language Settings

Template language settings let you import translations for each question and section in a Microsoft Excel spreadsheet. For more information about how to import translations, see [Template Translation](#).

4.6.0.8 Organization Association

On the Properties tab, selecting a project is as simple as selecting the check box next to the project name.

In any parent level, you can click the **Select all** or **Deselect all** option, if appropriate.

Projects not available to you are grayed out.

Clicking the **+ Future Children** button in a parent organization allows you to associate templates and users with that parent organization and all its children with just one click. The association can also persist through any new children (projects) that get associated after the original selection, so you do not have to manually add each project.

TIP

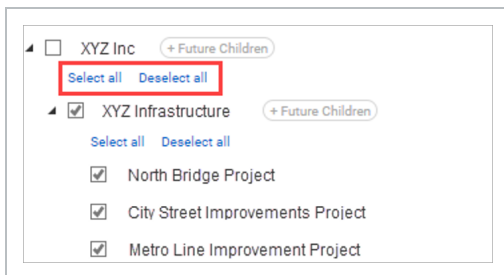
After the **+ Future Children** button is selected, it changes color.

Select Only the Parent Organization

When you select a parent organization, only that organization is selected. If the parent organization has child suborganizations or projects, those children are not automatically selected when you select their parent. This change gives you the flexibility to fine-tune which children to associate.

Select or Deselect All Child Organizations or Projects

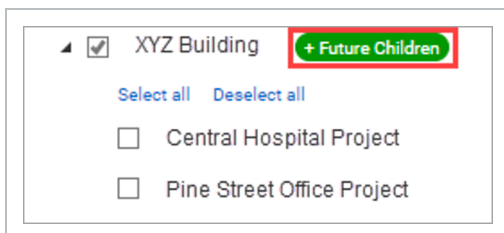
The **Select all** and **Deselect all** buttons are available for each parent organization with children. When you use these buttons, only the children are selected or deselected. The parent organization is not affected.

**NOTE**

When you select all, only existing children are selected. New projects are not automatically selected unless you use the + Future Children option. See the next section for more information.

Persistently Associate Future Children

The **+ Future Children** button is available for each parent organization. If you enable this option, all new children of that parent are automatically selected. This option prevents having to constantly select each new project when you create one.



NOTE

The + Future Children option works independently of the Select all option. For example, if you want to select all future new projects, but not necessarily all existing ones, you could select a few existing projects, or none, and still enable + Future Children.

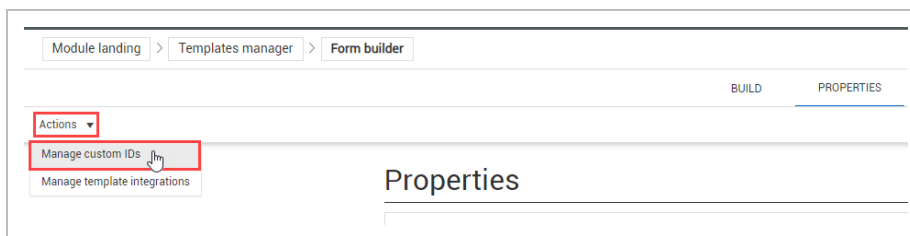
4.6.0.9 Manage Custom IDs

Custom IDs let you sort and filter forms and tasks for better management of your events and tasks. You can also assign multiple custom IDs to one template and add or remove properties for existing custom IDs.

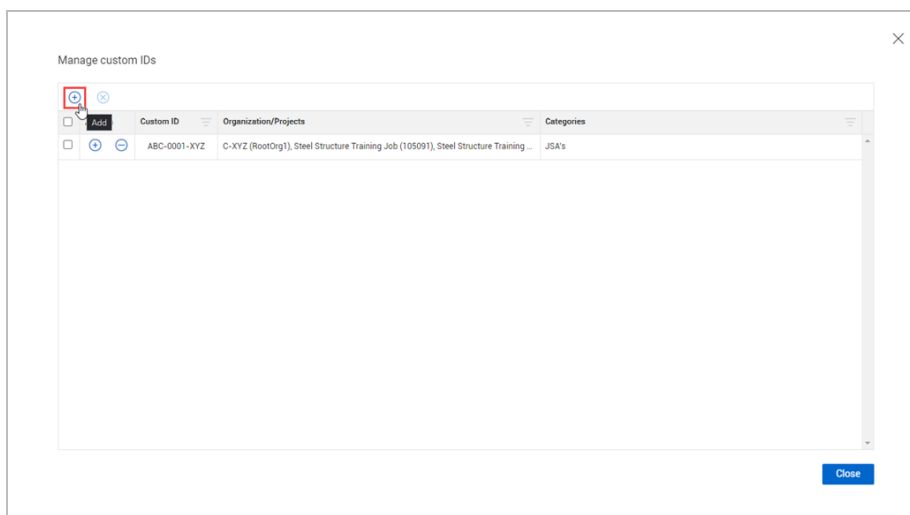
The following Step by Step shows you how to create a custom ID.

4.6 Step by Step 1 — Add a Custom ID

1. Click Actions > **Manage custom IDs** in the upper-left of the Form or Task builder's Properties tab.



- The Manage custom IDs dialog box opens
2. Click the **Add** icon to open the Add custom ID wizard.



3. Enter values in the Prefix, Starting number, and Suffix fields, and then click **Next**.

NOTE

You must fill out at least one of the fields, but you are not required to fill out all of them.

NOTE

Each of the fields can be up to 10 characters long. Prefix and Suffix are alphanumeric, and Starting number is only numeric.

4. Select the organizations and projects you want the custom ID associated with.
5. Optionally, select **Apply this custom ID to each selected project**.

NOTE

When this option is selected, the custom ID number increases independently for each project. For example, if the custom ID starts at CUS-200-ID and this option is selected, when you perform the form or task twice in Org/Project 1, the ID increases from CUS-200-ID to CUS-201-ID. If you then perform the same form or task twice in Org/Project 2, the ID also increases from CUS-200-ID to CUS-201-ID independently from the ID numbering in Org/Project 1.

6. Click **Next**.
7. Select the categories you want the custom ID associated with.
8. Click **Save & close**.

TIP

You can also click **Save & add new** to immediately add another custom ID.

4.7 TEMPLATE INTEGRATION

Template integration lets you make tasks available for use with InEight Change. For example, you might need to complete a task associated with a change issue.

NOTE

Template integration works only with Change and only for tasks.

The functionality to add an integration is in the template Properties tab. To add a template integration to a template, you must have a level 3 admin role, and the template must have already been published. If you do not have a level 3 admin role, you can see the Add template integration button, but you cannot use it.

The following steps explain how to add an integration to a template.

4.7 Step by Step 1 — Add a template integration

1. On the Properties tab of the task builder, under Options, click **Add template integration**. The Add template integration dialog box opens.

The screenshot shows the 'Properties' tab of a task builder interface. At the top, there are tabs for 'BUILD', 'PROPERTIES', 'FORM FLOWS', and 'HISTORY'. The 'PROPERTIES' tab is active. Below the tabs, there is a 'Category association' section with a table showing three categories and their associations. To the right of this is a list of organizations with checkboxes for selection. Below these sections is the 'Options' section, which contains several fields and a button. The 'Add template integration' button is highlighted with a red box.

Category	Association	Remove
Category 1	Associated	x
Category 2	Associated	x
Category 3	Associated	x

Select categories you want to associate to this form

Select organizations you want to be able to perform this form

Options

Available on mobile? ☐ Event title System default Event date System default ☐ Add expiration date

Available through form button only? ☐ Integration tag **Add template integration**

Enable print functionality ☐

2. Fill out the required fields:
 - Integration title
 - Category association - One category associated with this integration. For more information about categories, see [Categories](#).
 - Associated products - Text-only field that indicates which InEight application this integration is for.
 - Organization association - Organizations and projects that this integration is associated with. For more information about organization association, see [Template Properties - Organization Association](#).
 - You can also optionally fill out the Description field.

The screenshot shows a modal window titled "Add template integration". At the top, there's a dark header with "Online order" and a number "27114". Below this, there's a sub-header "Module: Safety" and "Created by: [redacted] 05/11/2021 06:31 AM". The main area is divided into two columns. The left column contains form fields: "Integration title" (text input), "Description" (text input), "Category association" (dropdown menu with "Select one" selected), and "Associated products" (text input). The right column contains an "Organization association" section with a search bar and a list of organizations. The list is currently empty, showing only "Root Organizations (RootOrg1)". At the bottom right, there are "Cancel" and "Save" buttons.

3. Click **Save**.

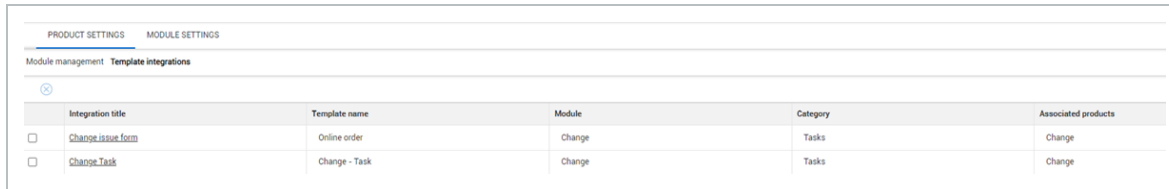
4.7.1 Manage template integrations

There are several ways to view existing integrations for a single template and for all your organization's templates

After at least one integration has been added for a template, the number of integrations is shown to the right of the Add template integration button. To view the current template's integrations, click the number next to the button. The Template integrations dialog box shows all integrations for the current template.

The screenshot shows a modal window titled "Manage template integrations". At the top, there's a header bar with "Actions" and a dropdown menu. Below this, there are two sections: "Select categories you want to associate to this form" and "Select organizations you want to be able to perform". Below these, there is an "Options" section with various settings: "Available on mobile?" (toggle), "Event title" (dropdown), "Event date" (dropdown), "Add expiration date" (checkbox), "Available through form button only?" (toggle), "Integration tag" (text input), and "Enable print functionality" (toggle). At the bottom right, there is a blue button labeled "Add template integration" with a red box around the number "1" next to it.

To view or edit all existing integrations for your organization, click the **Actions** button in the upper left of the Properties tab, and then select **Manage template integrations** in the drop-down menu. The Template integrations page opens. On this page, you can edit or delete integrations.



PRODUCT SETTINGS		MODULE SETTINGS			
Module management		Template integrations			
☐	Integration title	Template name	Module	Category	Associated products
☐	Change issue form	Online order	Change	Tasks	Change
☐	Change Task	Change - Task	Change	Tasks	Change

You can also access the Template integrations page from the Product Settings page. For more information about product settings, see [Product Settings](#).

4.8 TEMPLATE TRANSLATION

Templates can be translated into multiple languages with a Microsoft Excel template. When a template has translations applied, users can change the language in their user profile and view events and tasks in their selected language. Translation requires language setup in Module summary settings and Excel template export and import in Template properties. The export functionality gives you a template spreadsheet file with all of the questions and sections to fill out and import back into the form or task template.

4.8.1 Module Summary Setup

To make a language available in a module, go to Settings > Compliance > Module > **Module summary**, and then select the language in the Module language settings section. See [Module Summary and Organization](#) for more information.

4.8.2 Template Language Settings

You can export and import the translations Excel file in the template Properties tab under Template language settings.

Incident Report #2

Module landing > Templates manager > Form builder

BUILD **PROPERTIES** FORM FLOWS HISTORY

Actions ▼

Save

Options

Available on mobile? ☒ Event title System default Event date System default ☐ Add expiration date

Available through form button only? ☐ Integration tag

Enable print functionality ☐

Template language settings

English Español (América Latina) × ×

Export Import

NOTE

You must publish the template before exporting the Excel file. The Export and Import buttons are enabled only after you publish a template.

The following Step by Step shows you how to import translations.

4.8 Step by Step 1 — Import Template Translations

1. In the Template language settings, select a language from the drop-down menu.

NOTE

If you do not see the language you want, go to Settings > Compliance > Module > **Module summary**, and then select the language in the Module language settings section.

2. Click **Export**.

- A Microsoft Excel spreadsheet file is downloaded with all of the template questions and sections in rows

NOTE

After you export the Excel template, do not edit the published template until after you import translations. If the template is edited, you must publish the new version, and then export the Excel file again. If you try to import the old version of the Excel file, it results in an error.

- 3. Under the column for your chosen language, enter translations for each question and section.

NOTE

See the section below for more detailed information about translation template columns.

- 4. Save the file.
- 5. In the Template language settings, click **Import**, and then select the saved spreadsheet file.

TIP

If you make any further changes to the template, you must publish the template again, and then repeat the steps above.

4.8.3 Translation Excel Template

The translation template Excel file is created from the current published version of the form or task template.

	D	E	F	G	H
			Section/Section supporting text/Question/Question supporting text/Option/Option supporting text/hyperlink text to display/Form Flow Title	If questions are in columns you will see them shown here in a straight line going from a Z pattern from the form	
1	Type	Info	EN	ES	
2		Language Code			
3		Section	INCIDENT DESCRIPTION		
4	Text Short	Question	What happened?		
5	Date time	Question	When did the incident occur?		
6	People	Question	Who observed the incident?		
7	Form flow button	Question	Submit to Manager for Review		
8		Section	SAFETY MANAGER REVIEW		
9	List Checkbox	Question	Violations (select all that apply)		
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21	Text Short	Question	Findings:		
22	Form flow button	Question	Incident Finalization		
23		Template Name	Incident Report #2		
24		Form Flow Title	Incident Submittal		
25		Form Flow Description	Incident submitted to Safety manager		
26					

The Excel file consists of the following columns:

- A. (hidden) **Object ID** – Do not edit this column. These are specific IDs for form or task items. The numbers change between published versions of the form or task.
- B. (hidden) **Characteristic type** – Do not edit this column. This is the question type and is required for the migration path of information used in the import.
- C. (hidden) **Object type** – Do not edit this column. This is the type of form or task item and is used in the import process. The types are section, section supporting text, question, question supporting text, option, option supporting text, hyperlink text to display, and form flow title.
- D. **Type** – Do not edit this column. This shows each type of question.
- E. **Info** – Do not edit this column. This shows what object type and part of the template the row refers to. The object types are section, section supporting text, question, question supporting text, option, option supporting text, hyperlink text to display, and form flow title.
- F. **Section/Section supporting text/Question/Question supporting text/Option/Option supporting text/Hyperlink text to display/Form Flow Title** – This is the English version of entered text for each object type.

NOTE

Language Code of EN indicates English. Do not change the language code for any column.

- G. All columns following F are for other languages. Enter your translations for each object in these columns for each language.

TIP

You can apply HTML formatting such as bold, highlighted, and underlined to supporting text. HTML code is shown in column F. If you want to apply the same formatting to other language columns, you must manually enter or copy the HTML code to the other columns. If you do not enter or copy the code in the translated columns, the translation is shown as plain text.

4.9 FORM FLOWS

The Form Flows tab of the Form builder lets you manage all the form flows associated with a form template. A form flow adds workflow functionality to your form so that responsible parties can be actively engaged in an event's process life cycle. Including a form flow can be helpful if your business process needs to be handed off from the reporter to another individual or department. Each step of a form flow has an associated form flow button in the template that you, as a responsible party, can click to complete your part.

Multiple form flows can also be added to a form to suit your specific business processes. For example, when filling out a form, you might need manager approval to proceed sometimes, but not every time. In this case, you could have one form flow for when manager approval is required, and another form flow when it is not required. Each form flow's steps are independent of each other but contained in the same form.

The Form Flows tab is separated into the following areas:

1. Each form flow is shown as its own card with a description and number of steps.
2. When a form flow is selected, each of its steps is shown as a card with information like the associated button, the responsible party, and the number of days until the step is overdue. You can also add a new step here.
3. The side panel lets you edit fields associated with the selected form flow or step.

The screenshot displays the 'Incident Report' form builder interface. At the top, there's a header with 'Incident Report' and a 'Draft' button. Below the header, navigation tabs include 'Module landing', 'Templates manager', and 'Form builder'. The 'Form builder' tab is active, showing sub-tabs: 'BUILD', 'PROPERTIES', 'FORM FLOWS', and 'HISTORY'. The 'FORM FLOWS' tab is selected. On the left, a side panel (3) titled 'Incident Report workflow' allows editing the form flow name, description, creation date, time, and creator. The main area (1) shows a card for the 'Incident Report workflow' with a description and a 'Create form flow' button. Below this, a detailed view (2) of the workflow steps is shown, including 'Step 1' (Original Reporter) and 'Step 2' (Safety Manager) with associated buttons and a timeline.

4.9.1 Create a Form Flow

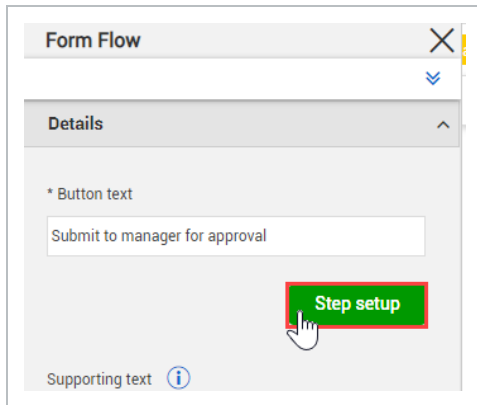
To create a form flow, you must use both the Build and Form Flows tabs to associate form flow questions with a form flow and its steps.

TIP

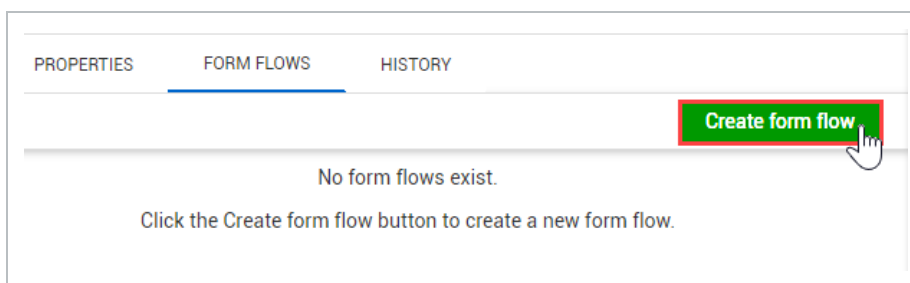
To efficiently plan and create a form flow, you can build your form with all of its form flow questions before moving to the Form Flows tab to associate those questions with steps.

There are two ways to start creating a form flow:

- From the Build tab, in the Form Flow Button's side panel under Details, click **Step setup**, and then click **Next** if you see a dialog box that says no form flows exist



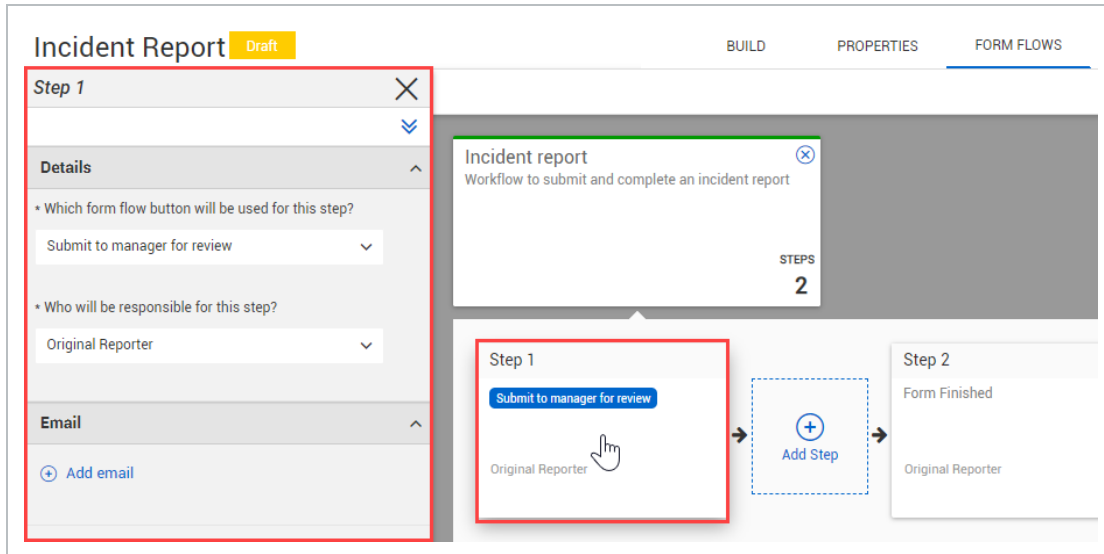
- From the Form Flows tab, click **Create form flow**



The following step by step walks you through the process assuming that you start from the Build tab.

4.9 Step by Step 1 — Create a Form Flow

1. In the Build tab, add a form flow question.
2. In the Form Flow Button's side panel under Details, click **Step setup**.
3. Click **Next** if you see a dialog box that says no form flows exist.
4. In the Create form flow dialog box, fill out the **Form flow name** and **Description**.
5. Select the **Step 1** card.
6. In the Step 1 panel on the left side of the page, in the Details section, select which form flow button to use for this step and who is responsible.



7. Optionally, if you want to send an email notification to the responsible party for this step, click **Add email** in the Email section and complete the dialog box.

NOTE

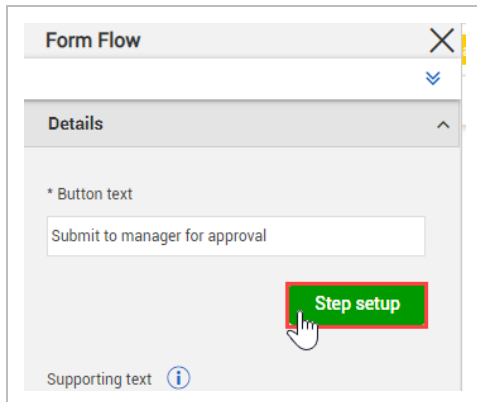
The email notification indicates the start of the step after clicking its form flow button, not the step's completion.

4.9.2 Set Up Form Flow Steps

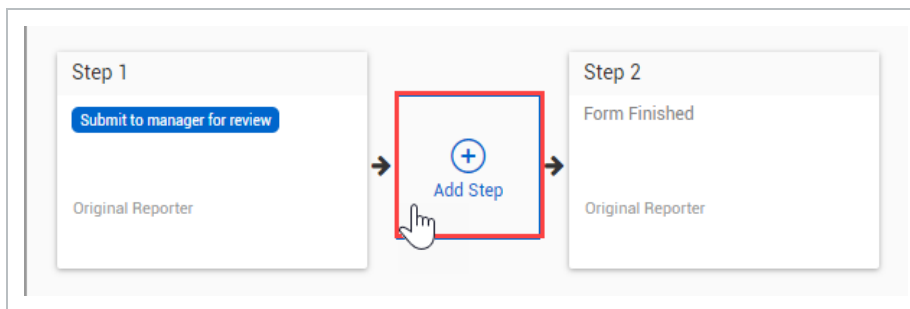
You can add a new step to a form flow through the Add Step button in the Form Flows tab or the Step setup button of a form flow question in the Build tab. The Add Step wizard contains several pages of options. After you have added a step, you can edit any of this information by selecting the step card and editing the fields in the left side panel.

There are two ways to start setting up an additional form flow step:

- From the Build tab, in the Form Flow button's side panel under Details, click **Step setup**



- From the Form Flows tab, click **Add Step**



The following step by step walks you through the process assuming you start from the Build tab and have at least one form flow and form flow question.

4.9 Step by Step 2 — Set Up an Additional Form Flow Step

1. Add a new form flow question in the Build tab.
2. In the Form Flow button's side panel under Details, click **Step setup**.
3. On the Step details page of the Add Step wizard, select the form flow button to use for this step.

NOTE

If you started the Add Step wizard from the Build tab, this option is already filled with the form flow button you selected.

4. Select whether this step can move to the next step when all responsible parties complete it or any one of them completes it.
5. Select who is responsible for this step.

- If you select **Users**, you must select a specific user.
- If you select **Role**, you must select which role and whether the user can choose an individual from the selected role to be responsible.

TIP

You can let the user choose an individual from the selected role if, for example, one individual with that role is off work and cannot complete the step.

6. Click **Next**.
7. On the Email page, select whether you want to add an email that notifies responsible recipients each time this step is reached, and then enter the contents of the email.

NOTE

The email notification indicates the start of the step after clicking its form flow button, not the step's completion.

TIP

You can personalize the email by pressing the @ key and selecting responses to questions in the form to insert.

8. Click **Next**.
9. On the Actions page, select the status the event changes to when this step is initiated.
10. Select how many days until this step becomes overdue and whether the days are counted from the initiated date or the previous step.
11. Optionally, select **Make this step reversible** to let users go back to a previous step. Select which step to go back to, whether to cc recipients to the email, and whether to require a comment when reversing.

NOTE

If you make a step reversible, you must go back to the Build tab after the step setup to edit the text of the new button, which is named Reversal form flow button by default.

TIP

The reverse form flow button can have leading logic applied to it independently from the button that advances to the next step.

12. Click **Next**.
13. On the Step access page, set view or edit access by role for each form question or section when the event is in this step. Access rules are shown as a table with the ability to view and edit as columns and questions and sections as rows. When you select a cell, a slide-out panel shows options for all roles, a select role, or no roles.

The screenshot shows the 'Step setup' interface for a form flow. The 'Step access' tab is active, displaying a table of questions and their permissions. A red box highlights the 'Ability to edit' column, and a callout window shows the 'Incident Information' dialog with radio buttons for 'All roles', 'Select roles', and 'No roles'.

Section / question	Ability to view	Ability to edit
Incident Information	All roles	All roles
Initial description of the incident	All roles	All roles
Date of the incident	All roles	All roles
Time the incident occurred	All roles	All roles
Specific location the incident occurred	All roles	All roles
Description of the incident	All roles	All roles
Was anyone injured during this incident?	All roles	All roles
Is the injured party internal or external to the project?	All roles	All roles
Name of the injured party	All roles	All roles
Name of injured party	All roles	All roles
What time did the injured party start work on the day of the incident?	All roles	All roles
Please add any pertinent photos	All roles	All roles
Incident Details	All roles	All roles
Incident classification	All roles	All roles
Did the injured party receive any kind of medical treatment?	All roles	All roles
Date started of lost time or restricted duty	All roles	All roles
Last date of lost time or restricted duty	All roles	All roles
If fatality, what was the date of death?	All roles	All roles
What is the job type of the injured party?	All roles	All roles
What was the cause of the injury?	All roles	All roles

NOTE The view and edit permissions you set on this page are applied to the form only when in this specific step of the form flow. Step access does not override question access given in the template. If you cannot view a question using the access given in the template, you cannot view it when step access is applied.

14. On the Button details page, select what form flow button is used to advance to the next step.

NOTE You can also select **None**.

15. Select whether this button completes the form flow.

16. Click **Save**.

4.9.3 Re-enable form flow

You can let users re-enable a form flow of a completed event by selecting a form flow, and then selecting the **Re-enable form flow on completed events** check box in the side panel.

When a user re-enables a form flow, they can move it back to the step of their choice. All step data is saved from previously completing the form flow unless the user changes an answer in a way that leads to different questions based on logic. Only the selected form flow is re-enabled, not all form flows associated with the template. If a re-enabled form flow leads to another form flow that is not re-enabled, the user cannot see the other form flow.

NOTE Users must have permission to edit completed events to re-enable a form flow.

4.10 TEMPLATE HISTORY TAB

The History tab provides a listing by date of changes made to a form or task.

Not all changes made to a template are shown in the history.

Form builder								
Module landing > Templates manager > Form builder								
Accident Form								
			BUILD	PROPERTIES	HISTORY			
Change type	Question/Option	Section	Old value	New value	Area	Version	Change date	Changed by
Question Added	Button - Submit form	SECTION HEADER		Submit form	Builder	2	10/10/2019 3:12 PM	Karen Loftus
Question Added	Manager's signature	SECTION HEADER		Manager's signature	Builder	2	10/10/2019 3:02 PM	Karen Loftus
Status	Not applicable	Not applicable	Published	Draft	Properties	2	10/10/2019 3:01 PM	Karen Loftus
Status	Not applicable	Not applicable	Draft	Published	Properties	1	10/09/2019 9:45 AM	Karen Loftus

Each time a form or task is updated and saved, a new Change date entry is created. Each of these changes constitute a new line item on the History tab.

Form builder

Module landing > Templates manager > Form builder

Accident Form

BUILD

PROPERTIES

HISTORY

Change type	Question/Option	Section	Old value	New value	Area	Version	Change date	Changed by
Question Added	Button - Submit form	SECTION HEADER		Submit form	Builder	2	10/10/2019 3:12 PM	Karen Loftus

Module landing > Templates manager > Form builder

Accident Form

BUILD

PROPERTIES

HISTORY

Layout types

✓ All changes have been saved (3:12 PM)

Cancel

Save

4.10 Step by Step 1 — View User History on Templates

1. From module landing page, select **Templates Manager**, and then determine if you need to look at an event or a task.
2. Switch the toggle in the proper direction, in this case, **Forms**.



3. Click on your preferred form.
4. Open the **History** tab.

Form builder									
Module landing > Templates manager > Form builder									
Activate & InActivate			BUILD		PROPERTIES	HISTORY			
Change type	Question/Opti	Section	Old value	New value	Area	Version	Change date...	Changed by	
Status	Not applicable	Not applicable	Draft	Published	Properties	2	01/07/2020 7:57 AM	Karen Loftus	
Property Option	Not applicable	Not applicable	Not available for mobile	Available for mobile	Properties	2	01/07/2020 7:57 AM	Karen Loftus	
Status	Not applicable	Not applicable	Published	Draft	Properties	2	01/07/2020 7:56 AM	Karen Loftus	
Status	Not applicable	Not applicable	Draft	Published	Properties	1	01/06/2020 8:02 AM	Karen Loftus	

INSPECTION AND TEST PLANS

4.11 INSPECTION AND TEST PLANS OVERVIEW

Inspection and Test Plans (ITP) is a feature that can be activated for templates to let you gather ITP information for a project. They can also integrate with InEight Plan. You can collect information to understand where you stand from a project perspective. At the organization level, administrators have the option to enable Inspection and Test plans for any given module.

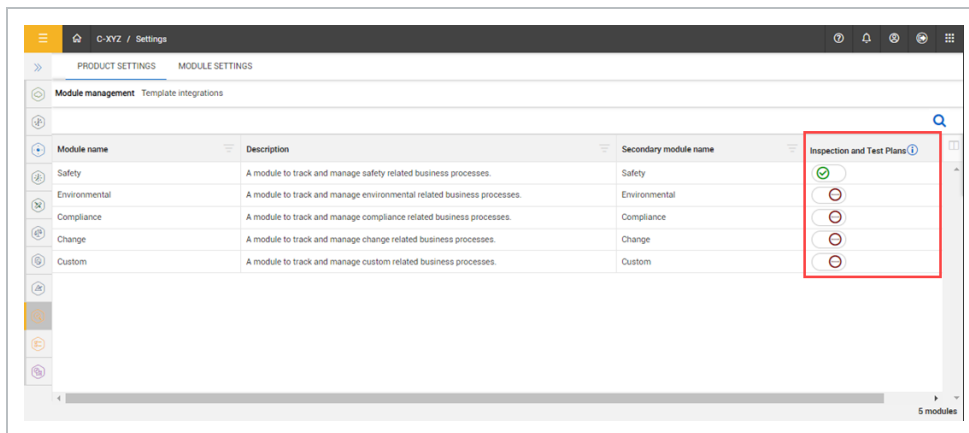
At the project level, with the appropriate permissions, you can enable Inspection and Test plans on a project by project basis.

4.12 CONFIGURE ITPS AT THE ORGANIZATION LEVEL

You can enable and disable Inspection and Test plans for a given module at the organization level in Product Settings.

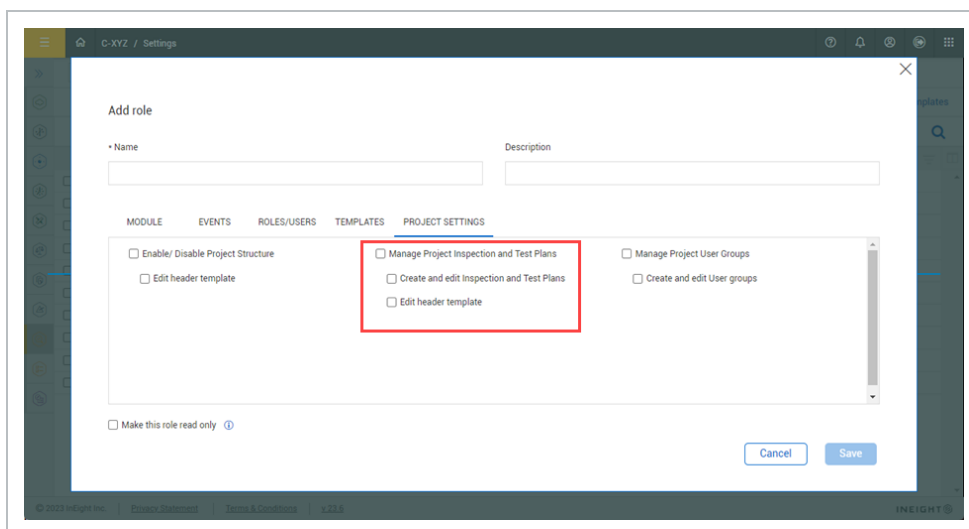
To enable and disable ITPs, in the Organizations home page, click **Settings** on the left navigation panel, and then click the **Compliance** or **Completions** icon.

Use the toggles to enable and disable ITPs for the module. When you enable ITPs, its related functions will show throughout the module. ITPs are disabled by default.



4.12.1 Configure project settings ITP permissions in Roles

When Inspection and Test Plans are enabled for a given module, you can then enable Project Settings ITP permissions in Roles.

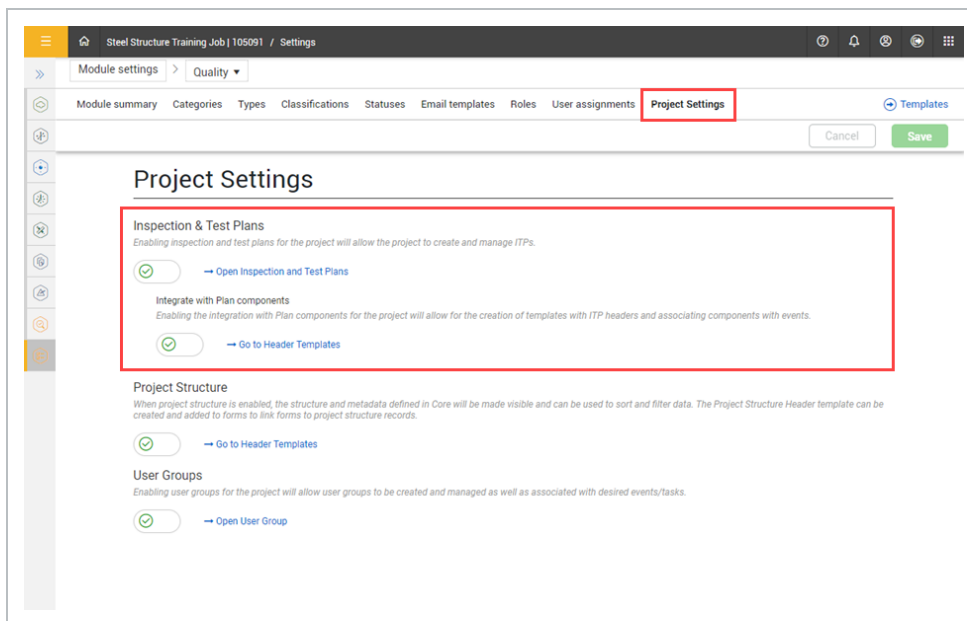


You can select the following options:

- Manage Project Inspection and Test Plans – When selected, this option includes Create and edit Inspection and Test Plans and Edit header template options.
- Create and edit Inspection and Test Plans – Lets you create and edit ITPs at the organization level.
- Edit header template – Lets you access and edit ITP header templates.

4.13 CONFIGURE ITPS AT THE PROJECT LEVEL

In the project's module settings > Project Settings tab, you can enable Inspection & Test Plans for the project to create and manage ITPs. This will also enable the **Open Inspection and Test Plans** link to open the Inspection and Test Plans page where you oversee and manage ITPs.



To integrate ITPs with InEight Plan, enable the **Integrate with Plan components** toggle. This will allow you to create templates with ITP headers and associate components with events. For more information see the Header templates topic.

4.13.1 Considerations

To integrate with Plan, you must enable **ITP mapping between Compliance and Plan** option at the project level in InEight Plan settings.

4.14 CREATE ITPS AT THE ORGANIZATION LEVEL

After Inspection and Test Plans have been enabled for the module, you can create and manage ITPs at the organization level. Create new ITPs manually or import them using a template. The template is available to download from the **Download template** link.

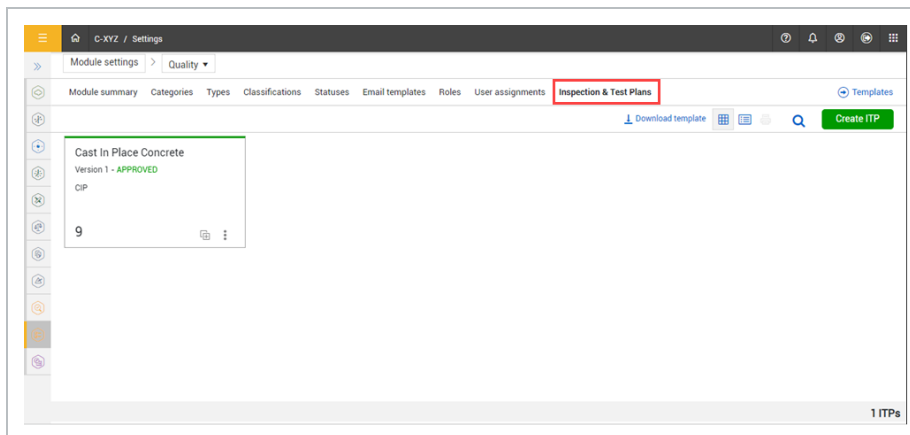
Navigate to Inspection and Test Plans at the organization level

1. From your organization home page click **Settings**, and then select **Compliance** or **Completions**. The Module management page shows the available modules under Product Settings.

NOTE

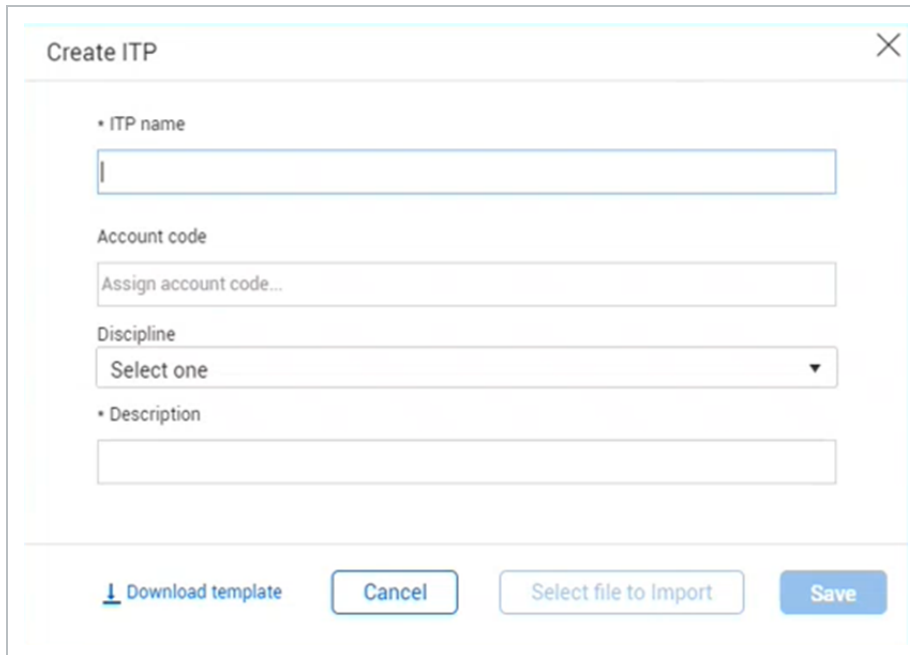
The Inspection and Test Plans toggle must be enabled for the module.

2. In the Product Settings landing page select the **Module Settings** tab, and then select a module. The Module settings landing page shows.
3. Select **Inspection & Test Plans**.



Create an Inspection and Test Plan

1. Click **Create ITP**. The create ITP dialog box opens.

A screenshot of the 'Create ITP' dialog box. The dialog has a title bar with a close button (X). Inside, there are four required fields: 'ITP name' (text input), 'Account code' (text input with placeholder 'Assign account code...'), 'Discipline' (dropdown menu with 'Select one' and a downward arrow), and 'Description' (text input). At the bottom, there are four buttons: 'Download template' (with a download icon), 'Cancel', 'Select file to import', and 'Save'.

2. Enter the ITP information, and then click **Save**.

Import ITP

1. In the Inspection & Test Plans page, click the **Download template** link. The Inspection and Test Plan Import Template is downloaded to your downloads folder.
2. Fill in the ITP information. Included in the template are the Instruction and Example sheets.
3. Click **Create ITP**. The Create ITP dialog box shows.
4. Enter the required fields, and then click **Select file to Import**.
5. Select the ITP template, and then click **Open**. The ITPs will show in the Inspection & Test Plan page.

4.14.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

4.15 CREATE ITPS AT THE PROJECT LEVEL

At the project level, you can create new ITPs manually from scratch, copy ITPs created at the organization level, or import them using a template. The template is available to download from the Download template button.

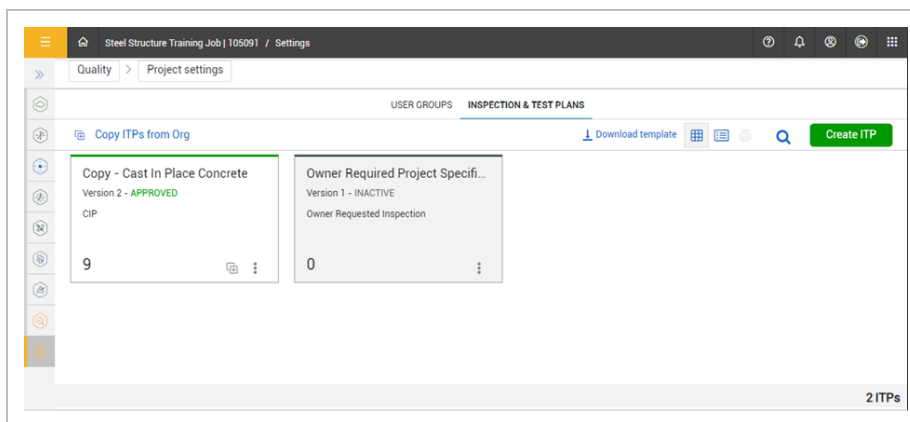
Navigate to Inspection and Test Plans at the project level

1. From your project home page click **Settings**, and then select the **Compliance** or **Completions** icon. The Module management page shows the available modules under Product Settings.

NOTE

The Inspection and Test Plans toggle must be enabled for the module.

2. In the Product Settings landing page select the **Module Settings** tab, and then select a module. The Module settings landing page shows.
3. Select the Project settings tab, and then click the **Open Inspection and Test Plans** link. The Inspection & Test Plans page opens.



Manually create a new ITP

1. In the Inspection & Test Plans page, click **Create ITP**. The Create ITP dialog box shows.
2. Enter the ITP information, and then click **Save**.

Copy ITP from organization

1. Click **Copy ITPs from Org**. The Copy ITPs from Org dialog box opens.
2. Select ITPs from the list and then click **Copy**. You can select up to 20 ITPs at a time.
3. The ITPs now show in draft mode in your projects Inspection & Test Plans page.

Import ITPs

1. In the Inspection & Test Plans page, click the **Download template** link. The Inspection and Test Plan Import Template is downloaded to the downloads folder.
2. Fill in the ITP information.

NOTE

Included in the template are the Instruction and Example sheets.

3. Click **Create ITP**. The Create ITP dialog box shows.
4. Enter the required fields, and then click **Select file to Import**.
5. Select the ITP template, and then click **Open**. The ITPs will show in the Inspection & Test Plan page.

4.15.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

HEADERS

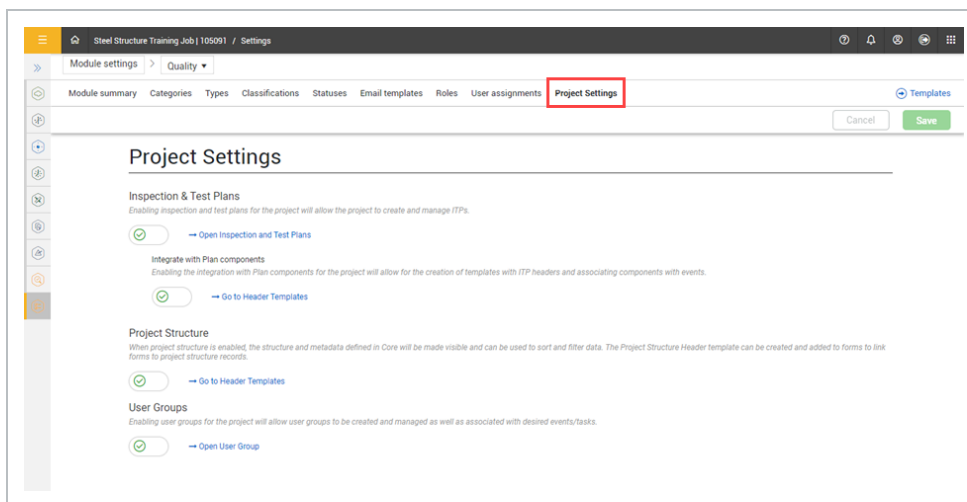
4.16 HEADERS OVERVIEW

You can create Inspection and Test Plan and Project Structure templates headers in the Headers tab. When you enable the project's header feature in Project settings, the headers are automatically created. The header templates ensures that the data captured remains consistent through the use of question types.

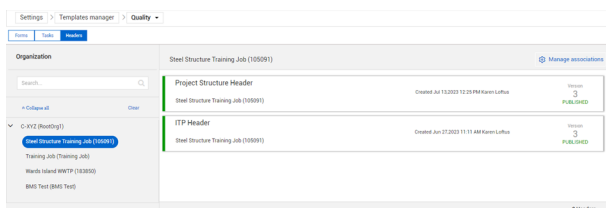
4.17 ITP HEADER-TEMPLATE

When you enable Inspection & Test Plans for the project, you can also enable the ability for the form to seamlessly integrate InEight Plan components using a template header. This ensures that component data captured from Plan remains consistent through the use of question types.

To do this, enable the **Integrate with Plan components** toggle. This will enable the Go to Header Templates link to access the Headers page.

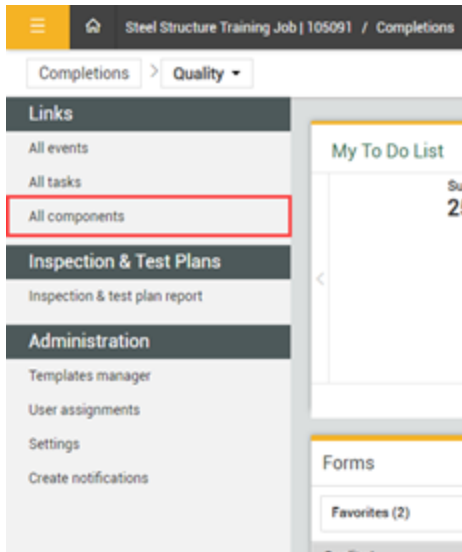


Click the **Go to Header Templates** link to open the Headers page. You can oversee and manage ITP Headers for projects.



4.17.0.1 All components grid

View all component activities and their status in the All components option. You can track the work performed against a component in the module landing page, under **Links**.



The All components option groups events by component.

 A screenshot of the InEight Platform interface showing a table of events grouped by component. The table has columns for Event ID, Event title, Event date, Reporter, Status, Form name, and Types. The events are grouped by component ID (2778 and 2795). The status of the events is 'Pending' and 'Complete'.

Event ID	Event title	Event date	Reporter	Status	Form name	Types
2778	20230621000... Event 1356	06/21/2023	Michael	Pending	Reporting - Shaw Testing Form	Mali 1
2795	20230627000... 6.16plus 27.6J	06/27/2023	Karen	Complete	Reporting - Shaw Testing Form	Mali 4

4.18 PROJECT STRUCTURE HEADER TEMPLATE

You can use a Project structure header to seamlessly integrate with InEight Platform master data ensuring data consistency and providing a single source for InEight Platform data.

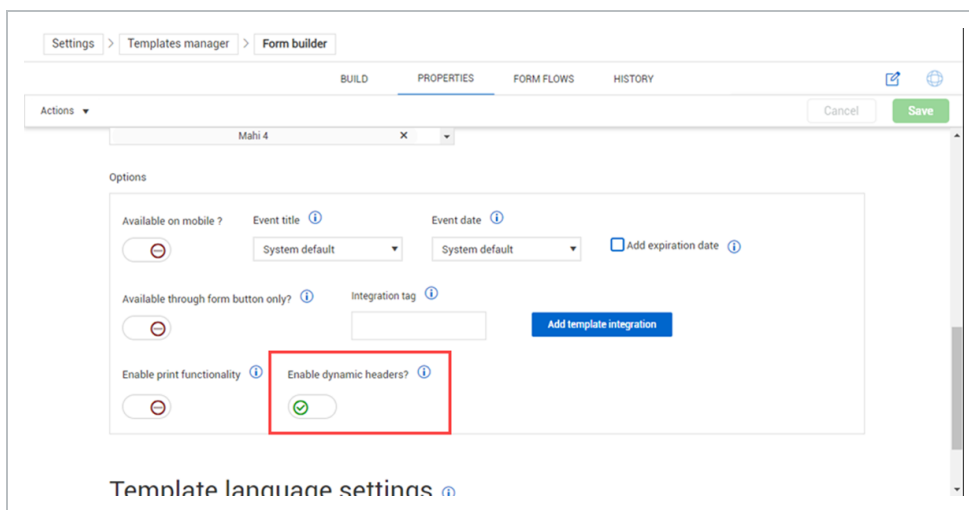
To do this, enable the **Project Structure toggle**. This will enable the **Go to Header Templates** link to access the Headers page. In the Headers page, you can oversee and manage Project Structure Headers for projects.

4.18.1 Considerations

To integrate Project Structure header with Platform, all Project Structure definitions and changes must first be made in Platform.

4.19 DYNAMIC HEADERS TOGGLE

ITP and Project Structure dynamic template headers are used to enhance your template forms. You can enable and disable the use of header templates created for your project using the **Enable dynamic headers?** toggle feature in your template properties.

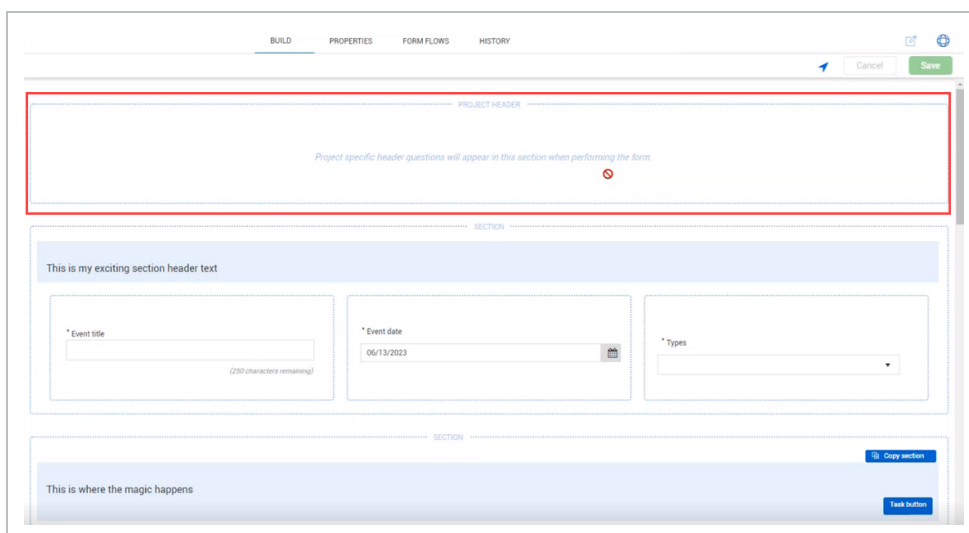


The screenshot shows the 'Form builder' interface with the 'Properties' tab selected. The 'Options' section contains several settings:

- Available on mobile?**: Toggle switch (off).
- Event title**: Dropdown menu (System default).
- Event date**: Dropdown menu (System default).
- Add expiration date**: Toggle switch (off).
- Available through form button only?**: Toggle switch (off).
- Integration tag**: Text input field.
- Add template integration**: Button.
- Enable print functionality**: Toggle switch (off).
- Enable dynamic headers?**: Toggle switch (on, highlighted with a red box).

At the bottom, there is a link for **Template language settings**.

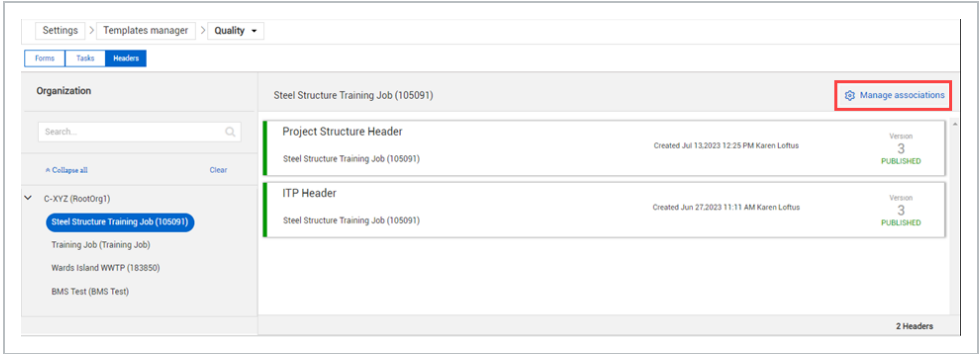
When enabled, the Project Header space will dynamically show to serve as a placeholder at the top of the form and the form will show in the Manage associations page to associate headers to your form.



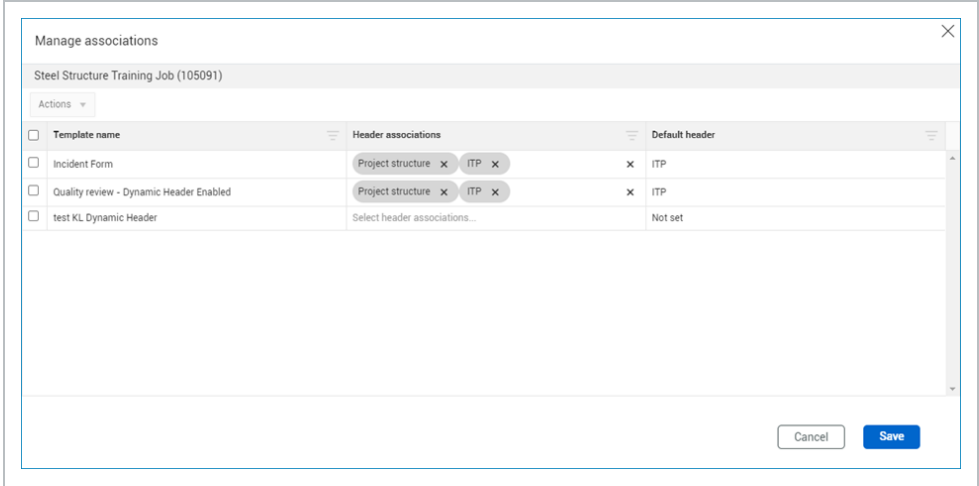
The screenshot shows the 'Form' view of the 'Form builder' interface. The 'PROJECT HEADER' section is highlighted with a red box and contains the text: "Project specific header questions will appear in this section when performing the form." Below this is a 'SECTION' containing form fields for 'Event title', 'Event date', and 'Types'.

4.20 MANAGE ASSOCIATIONS

You can associate published header templates with template forms in the Manage associations page. In the Headers page, click **Manage associations**.



On the Manage associations page, you can view templates with dynamic headers that meet specific conditions. In the header associations column, you can select which header templates to associate with each template. If both header templates are selected, you can choose the header template that shows when filling out the form. If the header association is not set, the header templates will not show in the form.



FORM AND TASK EXECUTION AND MANAGEMENT (WEB)

Lesson Duration: 45 Minutes

Lesson Objectives

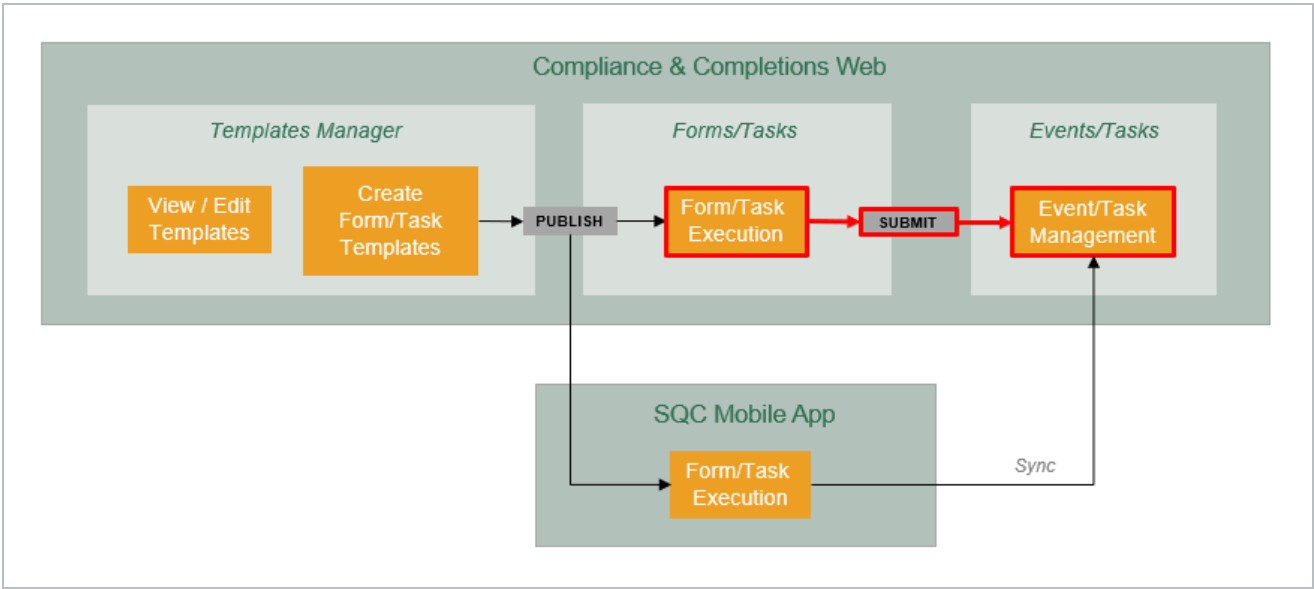
After completing this lesson, you will be able to:

- Launch a form and task
- Fill out and submit a form and task
- Manage events and tasks

Topics in this Lesson

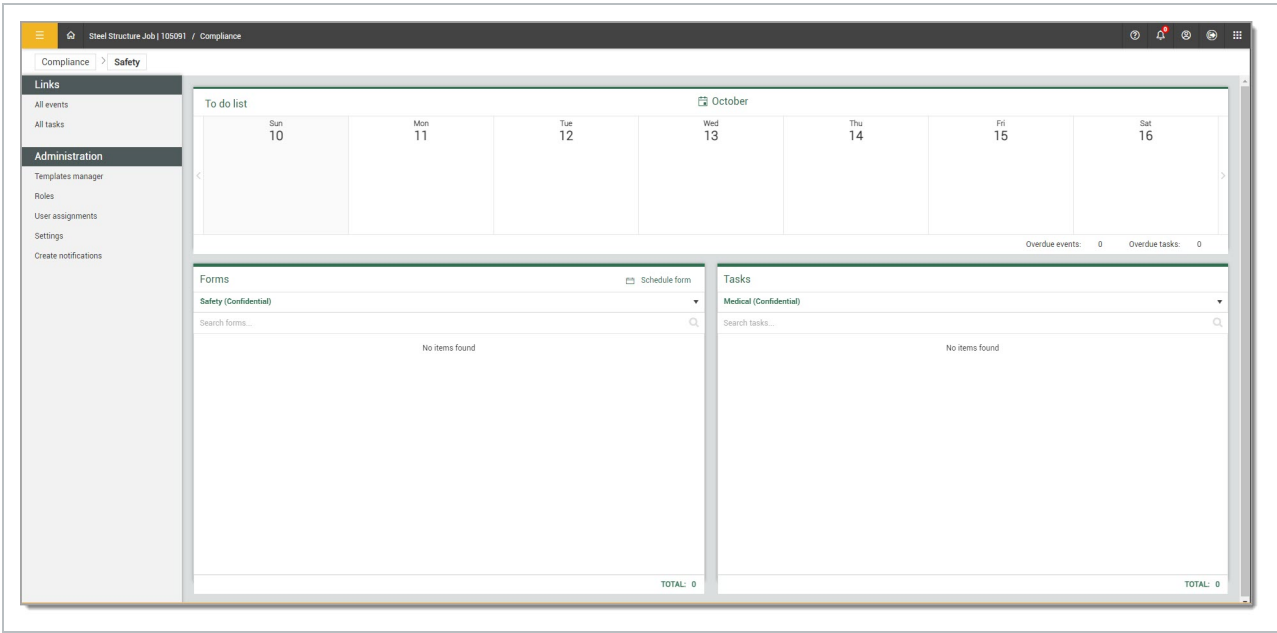
5.1 Forms and Tasks	162
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5.1 FORMS AND TASKS



5.1.1 Launching a Form or Task

You can launch a form or task by navigating to the Completions landing page, and then choosing a category in the Forms or Tasks window.



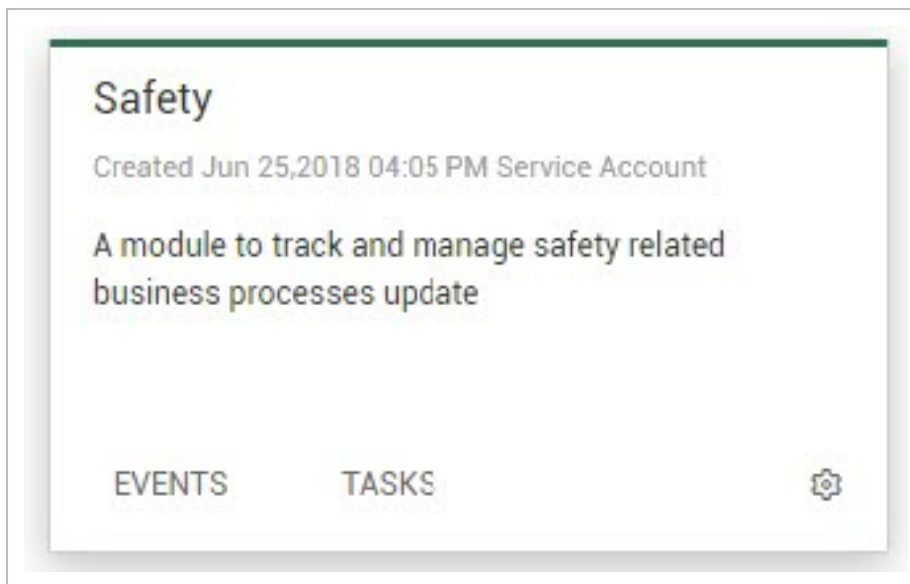
In the Forms and Tasks windows you can select the Favorites drop-down list, and then a category associated with the module needs to be selected. A category contains the forms or tasks that are associated with Compliance.

TIP

If you do not see a category that applies, it means you do not have Compliance assignments to that category for that project.

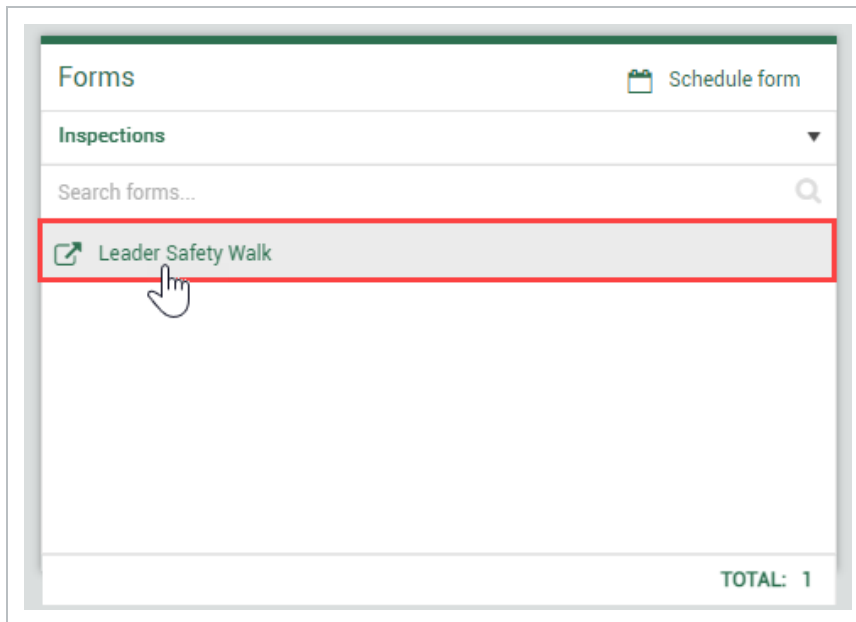
5.1 Step by Step 1 — Launch a Form

1. Open the InEight project portfolio web application.
2. Navigate to the **Compliance** Landing page module.
3. Select the **Safety** module card.



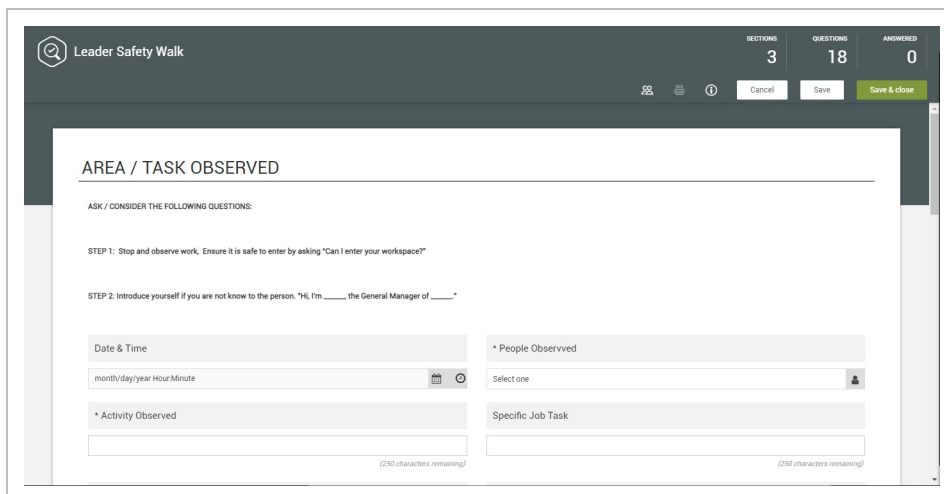
4. On the Module landing page find the Forms box, and then select a category from the drop-down menu.

- A list of forms appears on the screen associated to the category selected



5. Select a form.

A new window opens showing the selected form



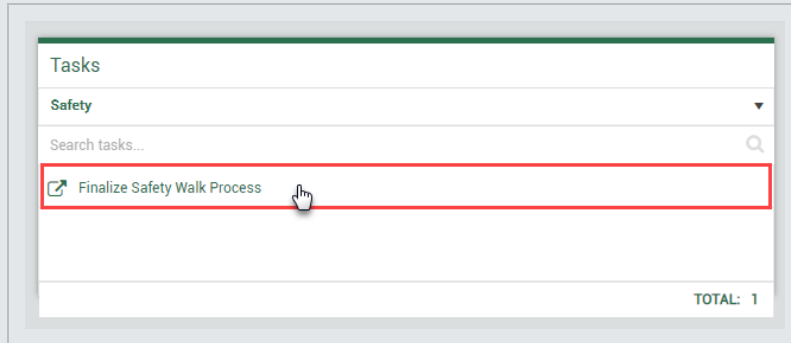
You can close the form by selecting **Cancel** on the top right corner

NOTE

Selecting Cancel results in the loss of any data you have entered since the last time you saved. The system does not autosave your work.

TIP

Launching a Task follows a very similar process. After selecting the appropriate tile (Safety in this case), you select the Task from the Task dialogue, selecting the appropriate category and then task.



5.2 FILLING OUT A FORM AND TASK - WEB

Scenario

Now that you have navigated to the Module landing page, and have selected the most suitable form, you can now start to fill out the form and eventually submit it. You will populate an Incident-related form, learn how to fill out certain fields, describe and attach photos, and then submit for review and approval.

After selecting the desired form from the Module landing page, it is now time to fill out the form and submit it. A task might also need to be completed.

There are many types of question formats which can include different types of fields: free text fields, calendar fields, time drop-downs, and more. Short free text fields have a 250 character limit. Long free text fields have a 4000 character limit.

NOTE

Form and task types can vary depending on the module type, and what is required to complete prior to submitting. The below overview is only an example of what a typical form might require.

Overview – Forms or Tasks Page

	Title	Description
1	Form name	Name of the template.
2	Quick info	The number of sections, questions, questions answered, and answers considered exceptions. If you click the number of sections or exceptions, a table of contents opens for easy navigation.
3	User groups	Select what user groups have access to this form or task. This button is available only at the project level.
4	Print	Print a PDF of the form or task.
5	Information	The number of questions that have been answered. It also shows you several details pertaining to the form or task.
6	Cancel and Save	Cancels the form or task. Any changes made since the last time you saved are lost. Saves the form or task in its current state, and you can continue to fill it out if necessary. You can also save and close to exit the form. For tasks, you can choose to save and start a new task.
7	Question types	Various ways of asking questions within a form or task. Examples include: • Attachments • Choice • Date-time • Form button • Form Flow • People picker
8	Signature block	Some forms or tasks might require a user to sign off prior to submitting it.
9	Button	The outcome of clicking on a form or task button vary depending on the button's configuration. The name of the button is defined by the administrator who created it (for example, Submit the form).
10	View active form flow	Lets you view which step and status in the form flow you are in. This only shows active after a form flow has started. If a form flow has not been started, the option is disabled.

Form example:

The screenshot shows the header of a 'Leader Safety Walk' form. It features a dark grey top bar with a magnifying glass icon and the title 'Leader Safety Walk' (callout 1). To the right, there are statistics: 'SECTIONS' (3), 'QUESTIONS' (18), 'ANSWERED' (2), and 'EXCEPTIONS' (0) (callout 2). Below these are icons for a checklist, a person, a printer, and an information icon (callouts 3, 4, 5). Action buttons 'Cancel', 'Save', and 'Save & close' are on the right (callout 6). A large white box labeled 'AREA / TASK OBSERVED' is in the center (callout 7). Callouts 8, 9, and 10 point to various UI elements like the form body, a scroll bar, and a button.

This section of the form contains two main input areas. On the left, 'Supervisor's name' has a dropdown menu labeled 'Select one' (callout 7). On the right, 'Supervisor's Signature' has a text input field with a clear button (callout 8). Below these are three time-related fields: 'Duration in hours', 'Start Time' (with 'Hour:Minute' sub-fields), and 'Stop Time' (with 'Hour:Minute' sub-fields). At the bottom left, there is a green button labeled 'Approve for Work' (callout 9).

Task example:

The screenshot shows the 'Corrective Action' form. It has a dark grey header with a magnifying glass icon and the title 'Corrective Action'. The header also displays 'SECTIONS' (1), 'QUESTIONS' (0), 'ANSWERED' (0), and 'EXCEPTIONS' (0). Action buttons 'Cancel', 'Save', and 'Save & close' are present. The main content area has three sections: 'Task title' with a text input field (250 characters remaining), 'Description' with a larger text input field (4000 characters remaining), and 'Attach any documents, files or photographs' with a file upload area (callout 10) that includes a plus icon and the text 'Select files or drag and drop'.

5.2.1 Header Information

Most forms contain basic identifying information such as date, time, and location of the event, or free text fields asking for details about the event. The header information is higher-level material needed to

complete a form. Not all forms have header information, however, as this is determined by the person creating the template of the form. Filling out the required information accurately is important for workflow and reporting reasons.

Tasks might also have header information as, at minimum, the Description, Responsible party and Due date are programmed fields.

Accident Information

Description of the accident (200 characters remaining)

* Date of incident month/day/year

Time the incident occurred hours:minutes

Specific location where the accident occurred (4000 characters remaining)

Please add any pertinent photos

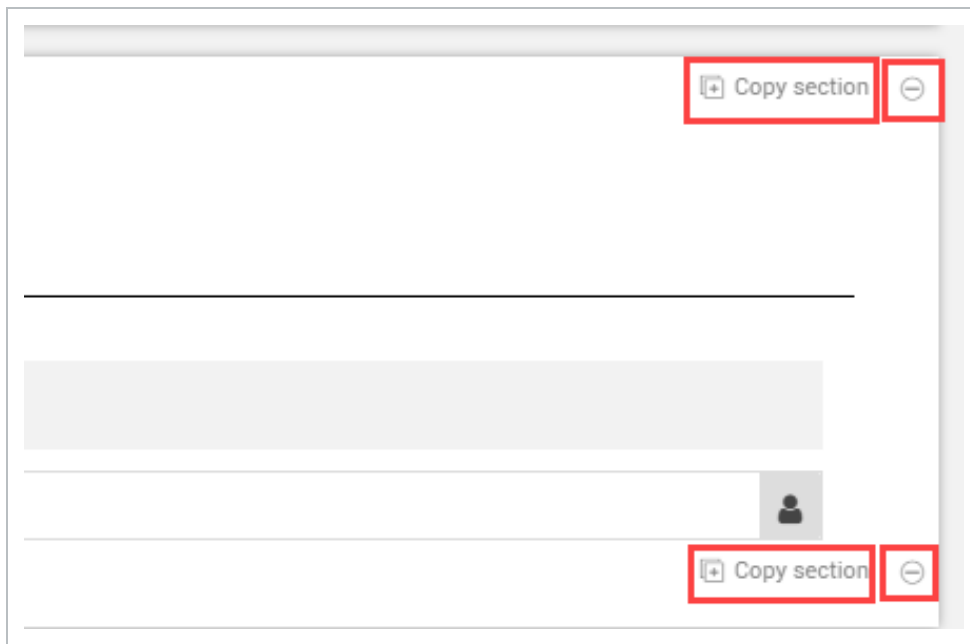
5.2.2 Copy a Section

Depending on how the form or task template is set up, you might be able to copy a section. If the copy option is enabled, use the Copy section button in the section header to copy the section below the current section.

NOTE The Copy section button might have a different name, depending on how the form or task template was set up.

NOTE On the web, the Copy section button is shown in both the upper-right and lower-right of the header.

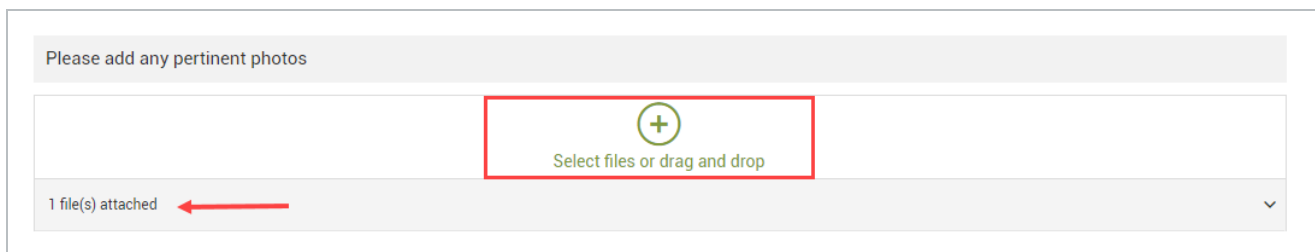
You can also click the **Remove** icon to remove a copied section.



A screenshot of a web form interface. It features a large text input area at the top, followed by a horizontal line, and then a grey rectangular placeholder. Below this is another text input area with a small user icon to its right. At the bottom right of the form, there are two buttons: 'Copy section' with a plus icon and a minus icon. Both buttons are highlighted with red rectangular boxes.

5.2.3 Attachments

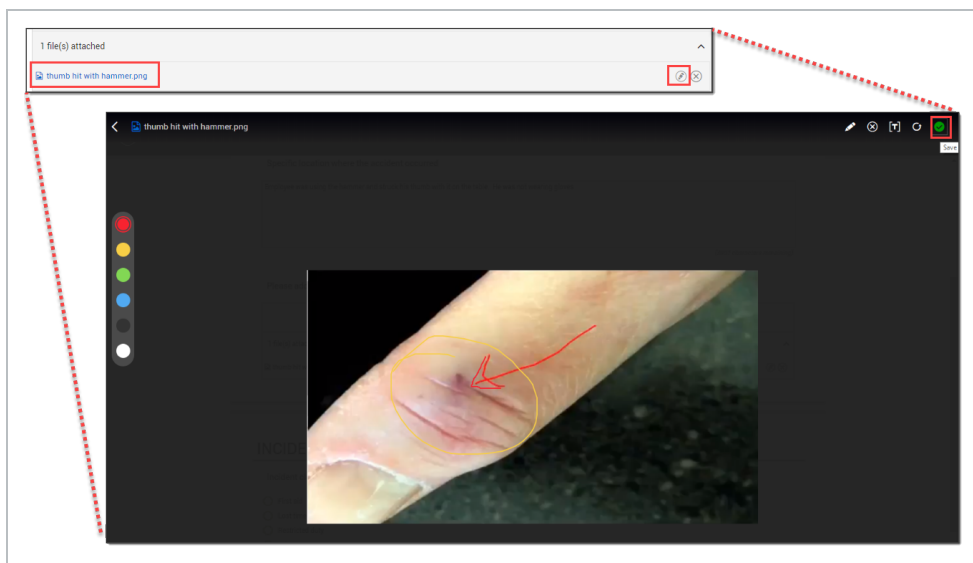
Some forms or tasks might include an option to include attachments such as photos. You can also include any annotations to describe the attachment in greater detail. Annotations help clarify what the photo represents.



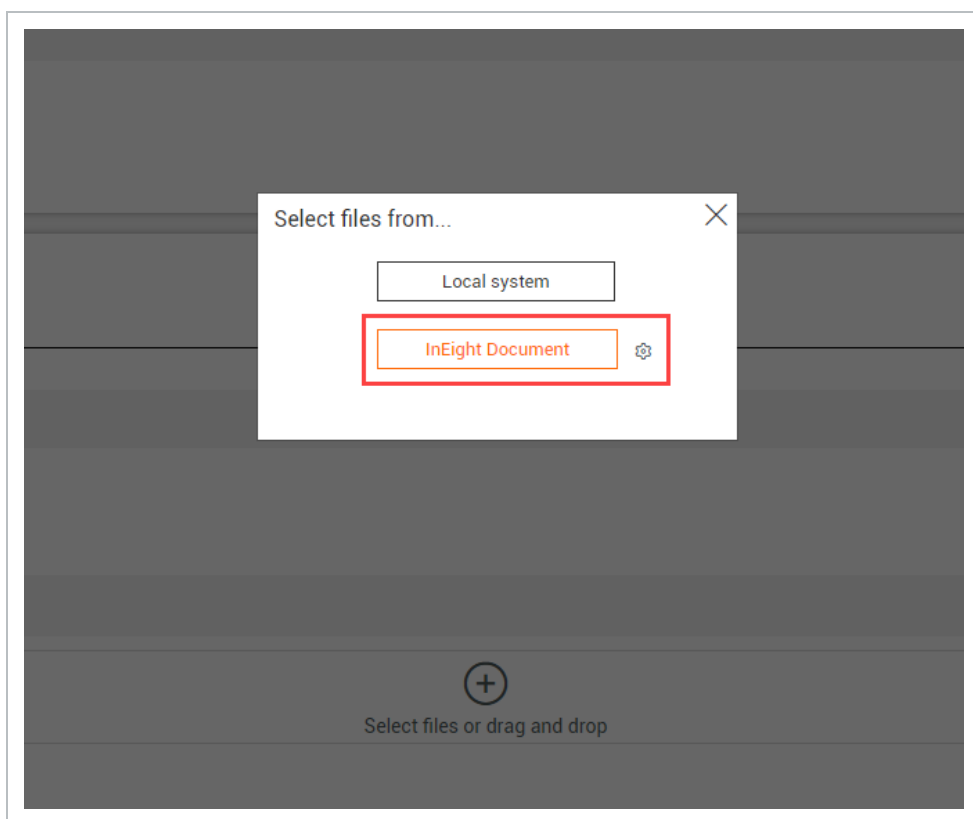
A screenshot of a web form interface for attachments. It has a header bar that says 'Please add any pertinent photos'. Below this is a large white rectangular area with a green plus icon in the center and the text 'Select files or drag and drop'. This area is highlighted with a red rectangular box. At the bottom left of the form, it says '1 file(s) attached' with a red arrow pointing to the right. A small downward arrow is visible at the bottom right of the form.

For example, you can include an attachment photo for an incident showing an injured thumb. After you click **Save**, it is saved in the form or task. You can also annotate the photo by drawing a red arrow to the specific injured mark on the thumb or adding descriptive text.

On mobile devices, a time stamp updates when edits are made.



If integration with InEight Document is set up, you can attach supporting documents from the Document application. Click **Select files or drag and drop**, and then click **InEight Document** in the dialog box.



A new window opens where you can sign into Document, and then enter search criteria. Click **Search**. Results are shown according to your Document user permissions. Select one or more documents, and then click **OK**.

Register View: -- All --

Documents that I can download

Status: -- All --

Discipline: -- All --

Type: -- All --

Document No.: Contains

Title: Contains

Category: -- All --

Date Recorded: ☒ Between And
☐ Within the last days

Date Released: ☒ Between And
☐ Within the last days

☐	Document No. ▲	Rev	Version	Sts	Title	Disc	Cat	PDF	DWG	DOC	OTHER
☐	ABC-123	A	A.01	IFR	TEST_Document	ADMIN	GEN	☐	☐	☐	☐
☐	ABC-124	A	A.01	IFI	Referential removal validation	ADMIN	GEN	☐	☐	☐	☐
☐	AUDIT-00001-ABC	A	A.01	IFI	Audit response	CP	ALL	☐	☐	☐	☐
☐	COMPLIANCE_VALIDATION_Di A	A.01	AB		Validation check	ADMIN	ALL	☐	☐	☐	☐
☐	COMPLIANCE_VALIDATION_Di A	A.02	AB		Validation check	ADMIN	ALL	☐	☐	☐	☐
☐	COMPLIANCE_VALIDATION_Di A	A.03	AB		Validation check	ADMIN	ALL	☐	☐	☐	☐
☐	DC-AUDIT-00001-ABC	A	A.01	IFI	Audit doc	CP		☐	☐	☐	☐
☐	DOC2AA	A	A.01	AB	Documentation check	ADMIN	ALL	☐	☐	☐	☐
☐	DOC2AA	A	A.02	AB	Documentation check	ADMIN	ALL	☐	☐	☐	☐
☐	DOC2AA	A	A.03	AB	Documentation check	ADMIN	ALL	☐	☐	☐	☐
☐	DOCUMENT1	A	A.01	AB	QADoc1	CIV		☐	☐	☐	☐
☐	DOCUMENT2	B	B.01	IFC	QADoc2	ARCH		☐	☐	☐	☐
☐	XYZ-123-ABC	-	-01	IFI	House drawings for customer	ADMIN	GEN	☐	☐	☐	☐
☐	XYZ-123-ABC	-	-02	IFI	House drawings for customer	ADMIN	GEN	☐	☐	☐	☐
☐	XYZ-123-ABC	-	-03	IFI	House drawings for customer	ADMIN	GEN	☐	☐	☐	☐
☐	XYZ-123-ABC	A	A.01	IFI	House drawings for customer	ADMIN	GEN	☐	☐	☐	☐

Page size: 100

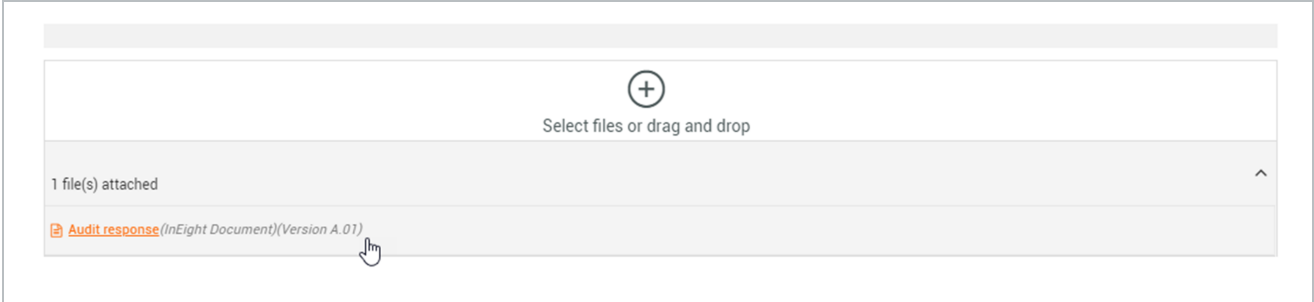
16 items in 1 pages

Search

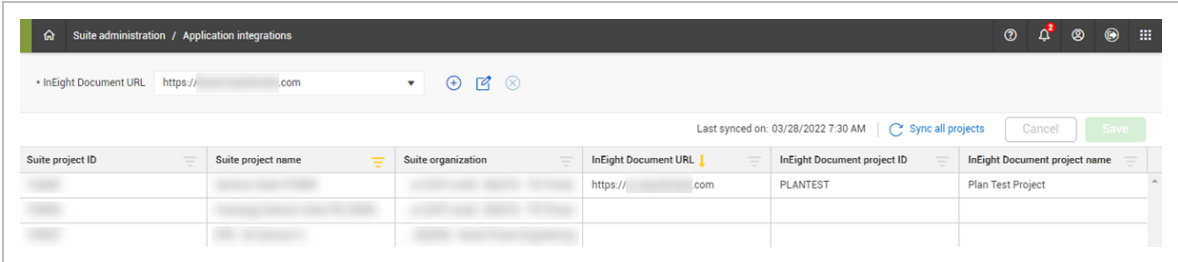
OK

Cancel

Document links are shown in the list of attachments in orange with the document version numbers. If you click a Document attachment, a new window opens to the Document application where you can see the details of an attached document and see it in the File Viewer.



If integration with Document is not set up, you cannot click the InEight Document button. If you are a level 3 administrator, you can click the **Set up InEight Document integration** icon. On the Application integrations page, add your InEight Document URL if it not already added. In the table, select your InEight Document URL and project ID in the same row as your project, and then click **Save**.



5.2.4 Form and Task Details

The form might require you to fill out additional details. For example, for an incident-related form you may need to determine if the incident required any first aid or if it was a near miss.

INCIDENT DETAILS

Incident classification

☐ First aid
☐ Lost time
☐ Restricted duty
☐ Other rec.
☐ Non-work related
☐ Near miss
☐ Auto / Equipment
☐ Utility strike
☐ Fatality

* Did the injured party receive any kind of medical treatment?

☐ Yes
☐ No

What is the job type of the injured party?

Select one

What was the cause of the injury?

Select one

What is the type of injury?

Select one

What was the injured party doing just before the incident occurred?

Other form questions might include determining if the injured party received any medical attention, or what caused the injury.

INCIDENT DETAILS

Incident classification

☐ First aid
☐ Lost time
☐ Restricted duty
☐ Other rec.
☐ Non-work related
☐ Near miss
☐ Auto / Equipment
☐ Utility strike
☐ Fatality

* Did the injured party receive any kind of medical treatment?

☐ Yes
☐ No

What is the job type of the injured party?

Select one

What was the cause of the injury?

Select one

What is the type of injury?

Select one

What was the injured party doing just before the incident occurred?

TIP

Tasks might also require you to fill out additional details.

5.2.5 Smart Forms and Tasks

Smart forms and smart tasks generate additional questions based on how the original question was answered. For example, the below image is showing that only if the question "Was anyone injured during the accident" is answered Yes, is the following question, "Did the injured party receive any kind of medical treatment?," shown.

Leading questions

Did the injured party receive any kind of medical treatment?

Show this question when the following question is answered:

Was anyone injured during this incident? is Yes

Select a question Select a response

+ Add leading question

Cancel Save

5.2.6 Form Within a Form or Task

There might be a need to open a new form from within the existing form or task you are working in. For example, while working on an Incident form you might need to start a Worker's compensation claim report.

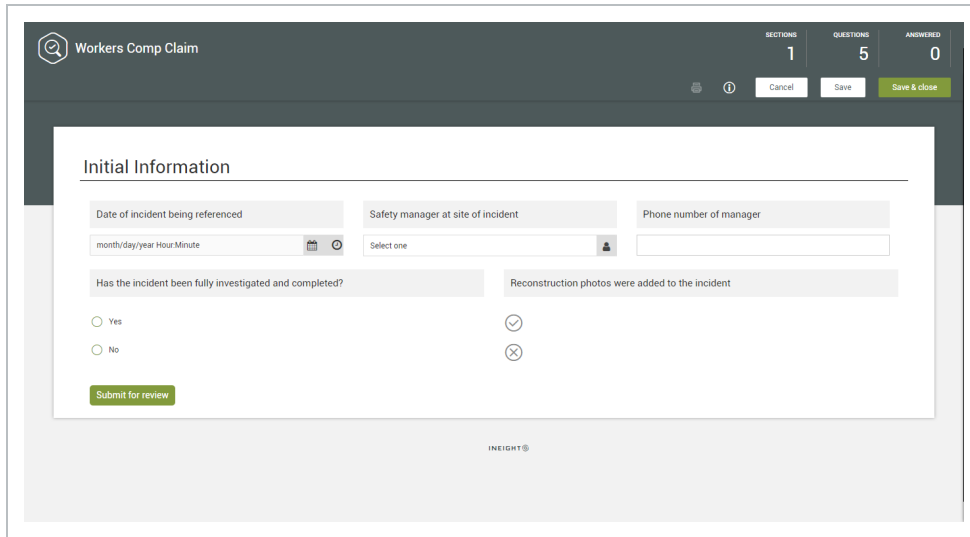
CLOSURE OF INVESTIGATION

If you believe that a claim is required on this incident, please start the process by clicking here

Click here to start a workers comp claim report ⓘ

By selecting the Workmans comp claim report form button, a new form generates, and you follow the steps of that form to fill it out. After filling out the required information, you submit the form, which returns you to the original form or task you were working in.

When you click a form or task button, the status of the current form or task might change, depending on how it is set up by your administrator.

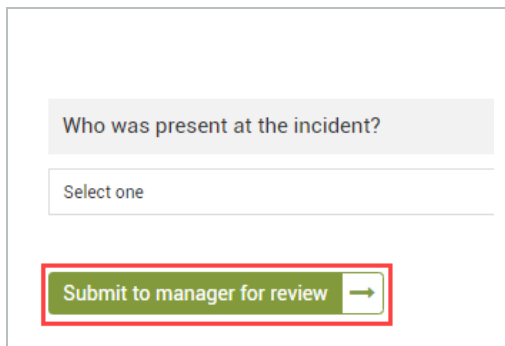


The screenshot shows the 'Workers Comp Claim' form interface. At the top, there's a header with the title 'Workers Comp Claim' and a progress bar showing 'SECTIONS 1', 'QUESTIONS 5', and 'ANSWERED 0'. Below the header, there are buttons for 'Cancel', 'Save', and 'Save & close'. The main form area is titled 'Initial Information' and contains several input fields: 'Date of incident being referenced' (with a date picker), 'Safety manager at site of incident' (with a dropdown menu), and 'Phone number of manager' (with a text input). Below these, there are two checkboxes: 'Has the incident been fully investigated and completed?' (with radio buttons for 'Yes' and 'No') and 'Reconstruction photos were added to the incident' (with a checked checkbox). At the bottom left, there is a 'Submit for review' button. The InEight logo is visible at the bottom center.

5.2.7 Form Flows

When the form you are filling out has a form flow associated with it, there are special buttons to complete each step in the flow. These form flow buttons appear similar to other form buttons but have an arrow icon next to them.

Form flow buttons that move the flow to the next step have a right arrow. Form flow buttons with a left arrow revert to a previous step.



The screenshot shows a form flow button. The form has a question 'Who was present at the incident?' with a dropdown menu labeled 'Select one'. Below the dropdown, there is a button labeled 'Submit to manager for review' with a right-pointing arrow icon. The button is highlighted with a red border.

When you click a form flow button after filling out all mandatory information, the form saves and closes.

Some form flows can be re-enabled after an event is completed, depending on the form flow's setup. Click the **Re-enable form flow** button in the upper-right of the page, if it is shown. When you re-enable a form flow, you can move it back to the step of your choice. All step data is saved from previously

completing the form flow unless you change an answer in a way that leads to different questions based on logic.

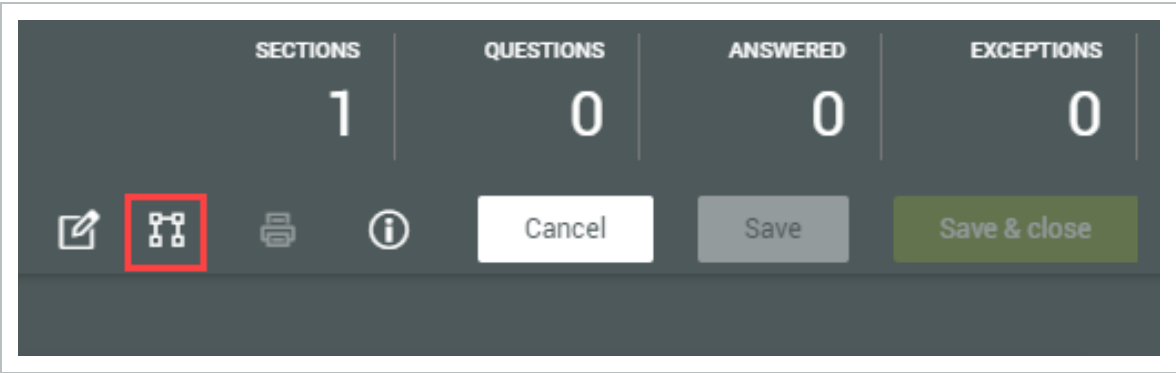
If you re-enable a form flow, only the selected form flow is re-enabled, not all form flows associated with the template. If a re-enabled form flow leads to another form flow that is not re-enabled, you cannot see the other form flow.

NOTE

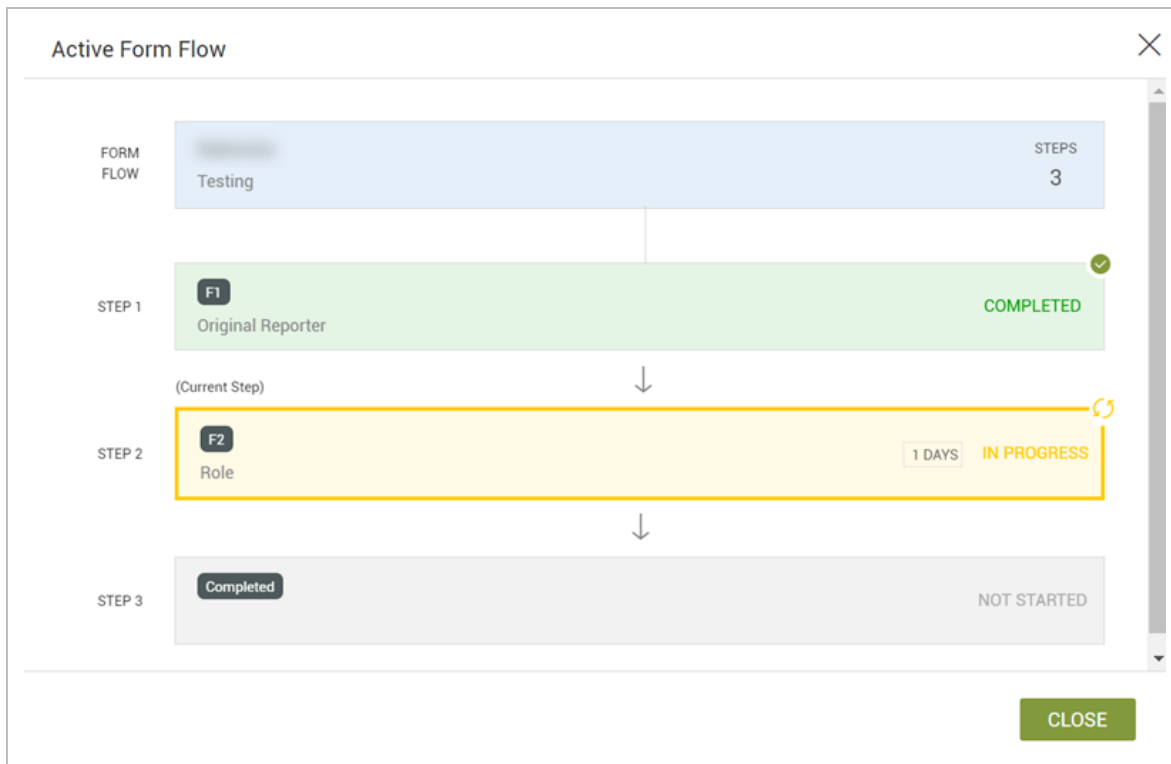
You must have permission to edit completed events to re-enable a form flow.

5.2.8 View Active Form Flow

When you open an event from the Events page, and the event has a form flow that has been started, you can click the View active form flow icon at the top of the page. The Active Form Flow dialog box opens.



At the top of the dialog box is the name and description of the form flow and the number of steps. Below them, each step is shown with its status and responsible party.



NOTE If a form flow is not started, this option is disabled.

5.2.9 GPS Questions

A GPS question lets you provide your location by clicking **GPS** or by entering your coordinates directly in the fields. You can also click **Clear GPS** to remove information if you need to enter a different location.

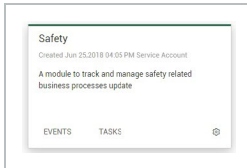
NOTE If you enter GPS coordinates automatically, you cannot manually edit the coordinates.

5.2.10 Complete a Form or Task

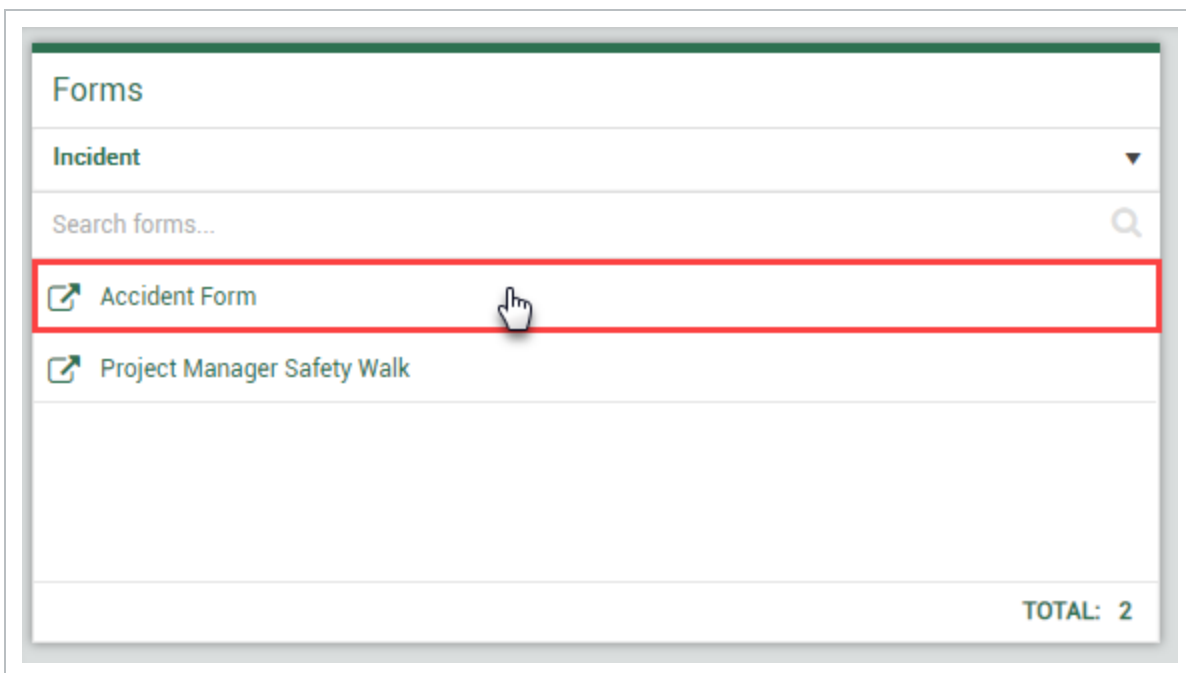
For more information on how to save and submit a form or task, see [Complete a Form or Task](#).

5.2 Step by Step 1 — Fill Out a Form

1. From the Compliance landing page, select a card module, Safety in this case.



2. From the Module landing page, select a category from the drop-down menu under Forms.
3. Under the category, select a form.



4. Complete all fields in the form, paying particular attention to those with an asterisk, which are mandatory fields, as they preclude you from moving ahead.

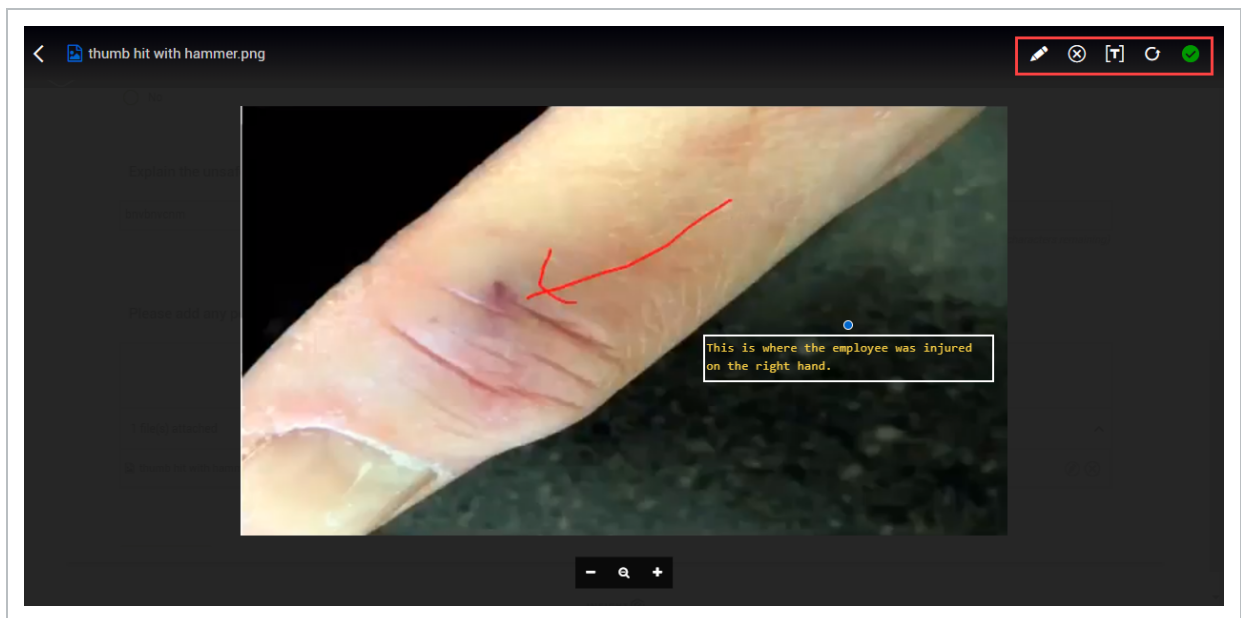
Has the incident been fully investigated and completed? ☐ Yes ☐ No	Reconstruction photos were added to the incident ☒ ☐
---	--

Some items require free-form data entry such as Description of the accident. Others require selecting a time or date.

Accident Information

Description of the accident	* Date of incident
	month/day/year 
(200 characters remaining)	

Other question types may require attaching documents. Use the annotation feature to add text or drawing to an image. In this case, you could draw an arrow showing the direct location of an injury.



Some questions require selecting from radio buttons or icon type questions.

Has the incident been fully investigated and completed?	Reconstruction photos were added to the incident
☐ Yes	☒
☐ No	☐

5. To update the photograph's annotations, Select the **Save** check mark.

6. On the top right of the form, select the **Information** button to see form information.

The screenshot shows a 'Workers Comp Claim' form. At the top, there are buttons for 'Cancel', 'Save', and 'Save & close'. Below these, the form title 'Workers Comp Claim' is displayed. The form contains several sections: 'Event Title' (Workers Comp Claim), 'Organization/Project' (C-XYZ), 'Module' (Safety), 'Category' (Claims), 'Event Date' (06/08/2021), 'Start Date' (06/08/2021), 'Status' (Pending), 'Reporter' (John Doe), and 'Version' (1). At the bottom, there are links for 'Attachments' and 'History'.

7. Forms most often have a button at the end to move the form along in its process. In this case, the **Click here to start a workers comp claim report** button initiates the form within a form feature, where the system branches to another form, in this case the Workers Comp claim form.

CLOSURE OF INVESTIGATION

[Click here to start a workers comp claim report](#) ⓘ

Signature of Safety Manager

A signature line with a large 'X' mark, indicating a placeholder for a signature.

[Close and complete this incident](#)

NOTE

The process for completing a task is very similar to filling out a form.

The process is similar whether checking the status of a form or task.

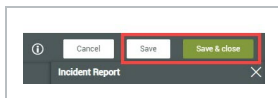
5.3 COMPLETE A FORM OR TASK ON THE WEB

There are several ways to finish filling out a form or task depending on how it is set up by your administrator and what the next steps are.

5.3.1 Save a form or task

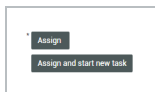
There might be times when you do not have enough time to complete a form or task in its entirety. When you do not have enough time to complete a form or task, or not all information about the event is readily available, you can save your work and continue or save and close and come back later to complete and submit it.

If you are filling out a task and want to start a new task immediately after saving the current task, click the **Save & close drop-down** button, and then select **Save and start new task**.



5.3.2 Assign a task

As part of filling out a task, you might have to assign it to someone else to complete a portion of it. To assign a task, click the **Assign** button. If you want to start a new task immediately after assigning the current task, click **Assign and start new task**.

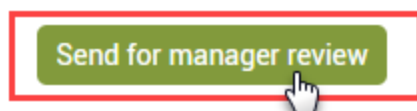


5.3.3 Submit a form or task

When you have all the needed information in the form or task, you are ready to submit it or send for manager review. This is the end of what you need to complete. An email notification, if applied, is typically sent to the manager.

NOTE

You can use the Button question type to facilitate a simple workflow outside of using the form flow feature.



As part of closing out the form or task, you might need to sign it, and the button varies depending on what type of form or task it is.

CLOSURE OF INVESTIGATION

[Click here to start a workers comp claim report](#)

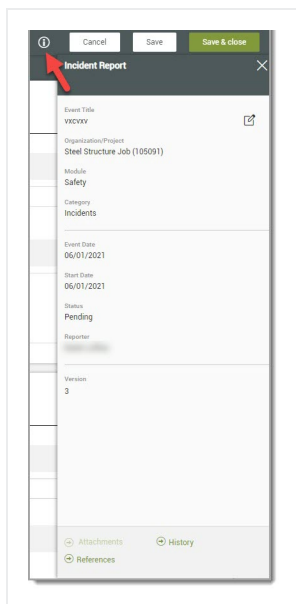


Signature of Safety Manager



Close and complete this incident

Before submitting the form or task, you can click the **Information** icon to see if there are any other questions left to be answered.



The screenshot shows a mobile application interface for an 'Incident Report' form. At the top, there are three buttons: 'Cancel', 'Save', and 'Save & close'. Below these, the form fields are organized into sections: 'Event Title' (Vaccov), 'Organization/Project' (Steel Structure Job (105091)), 'Module' (Safety), 'Category' (Incidents), 'Event Date' (06/01/2021), 'Start Date' (06/01/2021), 'Status' (Pending), 'Reporter' (a blurred name), and 'Version' (3). At the bottom, there are three tabs: 'Attachments', 'History', and 'References'. A red arrow points to the 'Save & close' button.

NOTE

If there are mandatory questions on the form or task, you are not able to submit it until they are answered.

TIP

The Edit button is only visible to those with authority to edit forms.

5.4 EVENT AND TASK MANAGEMENT

A Compliance event is an occurrence that has already happened; it therefore refers to forms that have already been filled out. Because events are part of a workflow, you can add more information to events, review existing data in the event, or move the event through the workflow.

The Events page shows a repository of forms in various statuses such as pending, with claims manager, manager review, and complete. The Task page is also a repository of forms that provides the same functionality as the Events.

The following are common column headings and their descriptions:

#	Event ID	Project/Organization	Category	Form name	Event title	Reporter	Status	Event date	Location
1	2023010400016	North Platform (103442)	QA Performance	Quality ITP Header 1 - Simple - DO NO.	Multi Component 1	Jyothimay	Pending	01/04/2023	On Web

	Title	Description
1	Attachment	Indicates whether an event or task has attachments. Click the icon to see the attachments.
2	Event or Task ID	The unique value assigned to each event or task.
3	Project/Organization	The project or organization associated with the event or task.
4	Category	The category associated with the event or task. It is specific per module and defined by the organization. Allows the module to be partitioned into smaller areas and assigned permissions.
5	Form or Task name	The name of the form or task template.

(continued)

	Title	Description
6	Event or Task title	The title given to the event or task by the user or generated by the system.
7	Reporter or Responsible party	For events, the user who initially submitted the form. For tasks, the responsible individual.
8	Event date or Due date	Date the event occurred or the due date of a task.
9	Status	Four default statuses are provided, Complete, Pending, Scheduled, and Canceled. Admins can create sub statuses under each that best align with their business processes.
10	Location	Shows whether the event or task location is On web or On mobile. When an event or task is scheduled and synced to a mobile device, a lock shows next to the Task title.

You can access events or tasks by going to the module landing page, and then selecting **All events** or **All tasks**.

The event ID, Event title are shown on the Events page. The Event status is also shown, and changes based on the state of the event.

	Event ID	Project/Organization	Category	Form name	Event title	Reporter	Event date	Status	Location
☐	20230112	Platform	Category A	Quality ITP Header 2	Quality ITP Header 2	Maresh	01/12/2023	Pending	On Web

The Tasks page also shows columns such as Task ID, Project/Organization, Category, and Status. Columns unique to the Tasks page include Task name, Responsible party, and Due date. Tasks automatically become overdue when the assigned due date expires. The tasks page shows a visual indication of overdue states. Sorting and filtering capability in the lists lets you to quickly associate tasks to individuals, categories, status, etc.

Quality > Tasks

Global Events/Tasks View

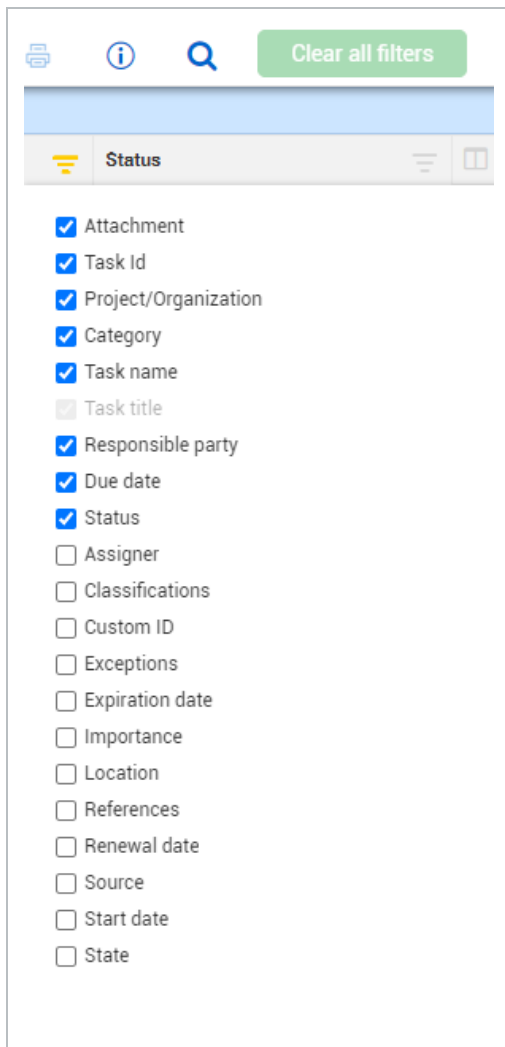
My view

Automatic date filter applied - to clear, use the due date column filter

Clear all filters

#	Task Id	Project/Organization	Category	Task name	Task title	Responsible party	Due date	Status
☐	20220111	S180000 - PK3 Inc (RoofOnG1)	Assessment	Report photo	Reference	Julio	01/25/2023	Pending
☐	20220111	VN Hoys North Platform (E100)	HA QA Performance III	Integrated list question - Do not edit	Reference	Jyothirmay	01/17/2023	Pending

In the Tasks page, like the Events page, you can update columns by clicking the Column chooser icon, and then selecting or deselecting the check boxes for columns you want to add or remove.



NOTE When a task is assigned, the responsible party receives an email with a link to complete the task.

NOTE Sorting or filtering by the Assigner and/or Responsible party, may be helpful.

5.4 Step by Step 1 — Add additional columns to the list of all events or all tasks

1. In the module landing page click **All events** or **All tasks**.
2. Click the **Column chooser** icon.
3. Select **Assigner** and **Responsible party**.

☒ Attachment

☒ Task Id

☒ Project/Organization

☒ Category

☒ Task name

☐ Task title

☒ Responsible party

☒ Due date

☒ Status

☒ Assigner

☐ Classifications

☐ Custom ID

☐ Exceptions

☐ Expiration date

☐ Importance

☐ Location

☐ References

☐ Renewal date

☐ Source

☐ Start date

☐ State

You are now able to sort or filter these columns.

5.4.1 Additional event or task functions

You can use the following functions in the All events and All Tasks pages:

1

2

3

4

5

6

7

 Edit properti...











Clear all filters

	Icon	Description
1	Edit properties	Edit properties of one or many selected events or tasks. All the selected events or tasks must be from the same template and you must have permission to edit them.
2	Notifications	Send notifications with messages to specific users, and roles for the

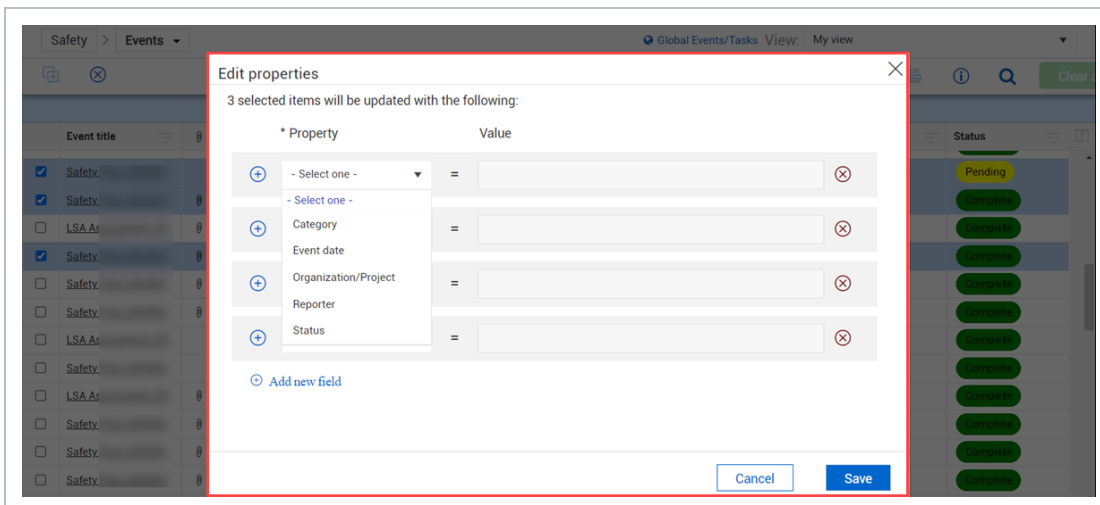
	Icon	Description
		specific project. This is available only at the project level.
3	Export events or tasks	Export data from the Events or Tasks list to Excel, with an email generated once the file export is completed.
4	Print	Print a PDF report of the selected event or task. The ability to print is based on template configuration.
5	Information	Open a slide-out panel to the right that outlines data about a specific EventID or TaskID. You can also see the history of changes to the event or task.
6	Search	Open a slide-out panel to search all columns in your view for specific terms.
7	Clear all filters	Revert the listing to its unfiltered state if filters have been used.

5.4.1.1 Edit properties

5.4 Step by Step 2 — Edit an event or task properties

1. In the All events or All tasks list page, select events or tasks by clicking the check boxes.
2. Click the Edit properties button.

The Edit properties dialog box opens.



3. After making your changes, click **Save**.

5.4.1.2 Notifications

As an administrator at the system level, you can control the ability to send notifications to roles and user in Organization home > Settings > Compliance > Module > **Roles** tab. You can also restrict users to send notifications to their assigned projects only.

Edit role

Name: Compliance module administrator

Description: Compliance module administrator - Provides access to all administration features

MODULE EVENTS ROLES/USERS TEMPLATES HISTORY

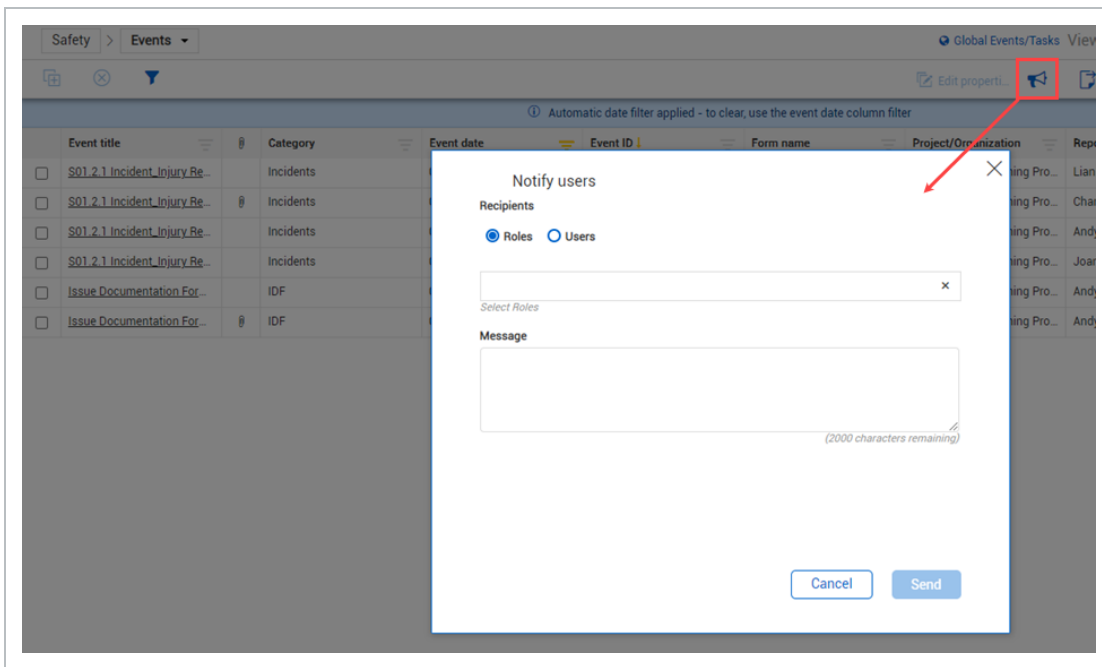
- ☒ Edit module summary
- ☒ Edit email templates
- ☒ Create and edit User groups
- ☒ Create and edit categories
- ☒ Manage module organization exclusions
- ☐ Create and edit classifications
- ☒ Create and edit statuses
- ☒ Create notifications
- ☒ Create and edit Inspection and Test Plans

☐ Make this role read only ⓘ

Cancel Save

5.4 Step by Step 3 — Send notifications

1. At the project level, click the **Notifications** icon.
The Notify users dialog box shows.
2. Select **Roles** or **Users** recipients, and then use the drop-down lists to select recipients.



3. Enter your message in the Message box. Messages can be up to 2000 characters.
4. Click **Send** when complete.

5.4.1.3 Export events and tasks

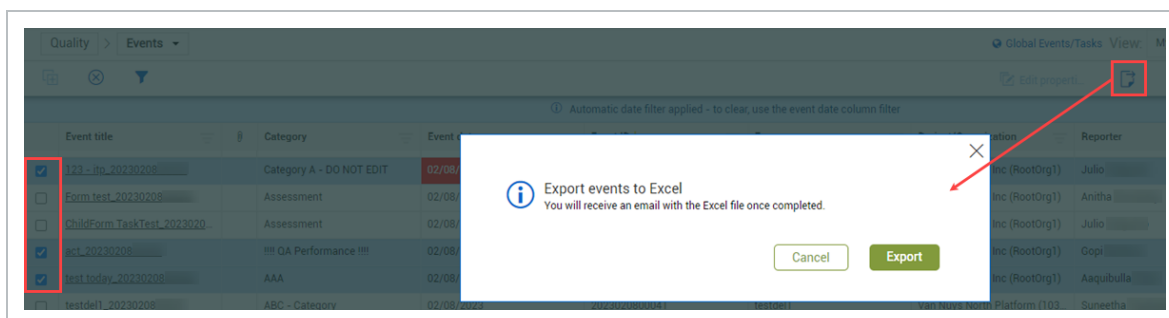
5.4 Step by Step 4 — Export events or tasks

1. In the **All events** or **All tasks** list page, click the **Export** icon.

The Export dialog box opens.

2. Select **Export** to export all items.

The export contains the filtered grid set that shows in your view. You can also export selected events or tasks by checking each item's check box, and then clicking the Export icon.

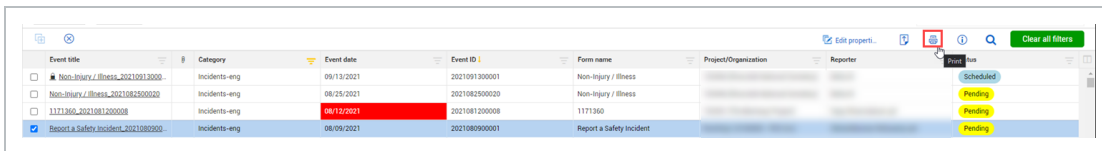


5.4.1.4 Print

You can print a report of an event or task that has been enabled to be printed. Print functionality can be enabled in the template's Properties tab. See [Template Properties](#) for more information.

5.4 Step by Step 5 — Print an event or task

1. In the **All events** or **All tasks** list page, select an event or task.
2. Click the **Print** icon to print the event or task.



A PDF of the report will open for the selected item in a new browser tab.

NOTE

The Print feature only works for one event or task at a time. To print in bulk, you can use InEight Report.

5.4.1.5 Form and task information

You can view data, references, and history changes of an event or task and edit their properties in the Form information slide-out panel.

5.4 Step by Step 6 — Navigate to event or task information slide-out

1. In the **All events** or **All tasks** list page select an event or task, and then click the **Form information** icon.

The Form information slide-out opens where you can view the form data.

2. Click **Edit properties**.

The editable fields show so you can edit them.

3. After editing any fields, click **Save**.

NOTE You must have permission to open the Form information panel.

Additional Form information panel options

You can also view attachments, references, and form history using the buttons at the bottom of the slide-out.

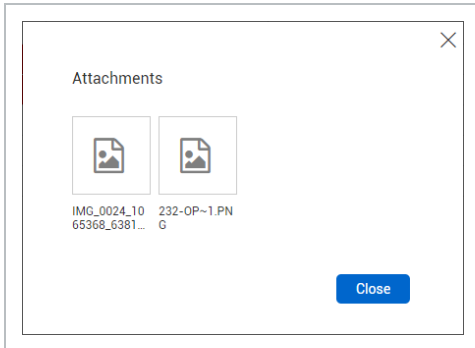
Attachments

You can view and edit attachments other events and tasks referenced in a certain event or task.

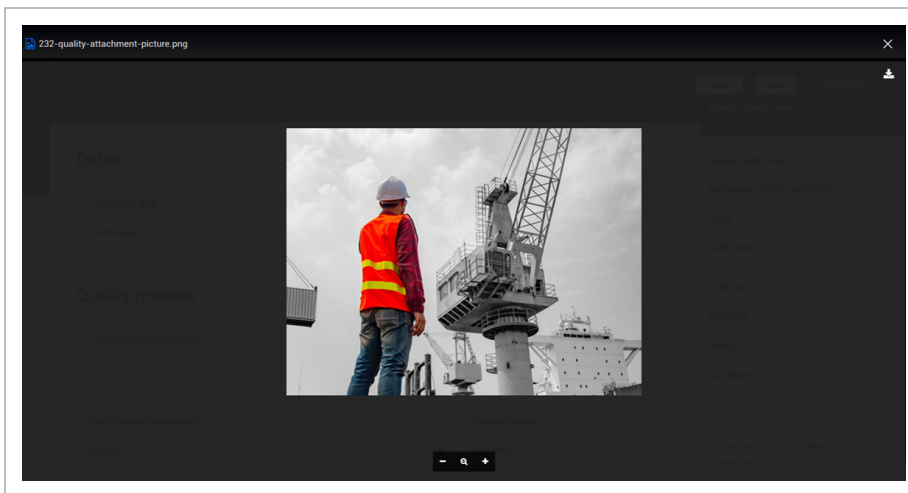
5.4 Step by Step 7 — View and download attachments

1. In the Form information slide-out, click **Attachments**.

The attachments dialog box opens.



2. Click an attachment to view.



3. You can zoom in or out using the **Zoom** icons.
4. You can click the **Download** icon in the upper right to download the attachment to your computer.
5. To close the attachment, click the **Close** icon in the upper right.
6. Click **Close** to close the Attachments dialog box.

NOTE The Attachments button is greyed out when there are no attachments in the form.

NOTE

You can also view an event or task's attachments by clicking the attachment icon in the Attachment column on the Events or Tasks pages.

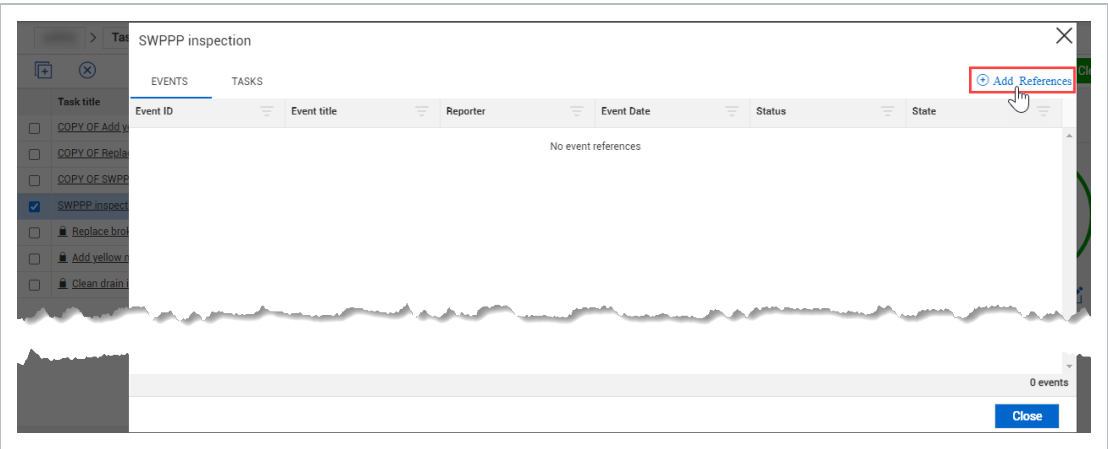
References

You can view other events and tasks referenced in a certain event or task.

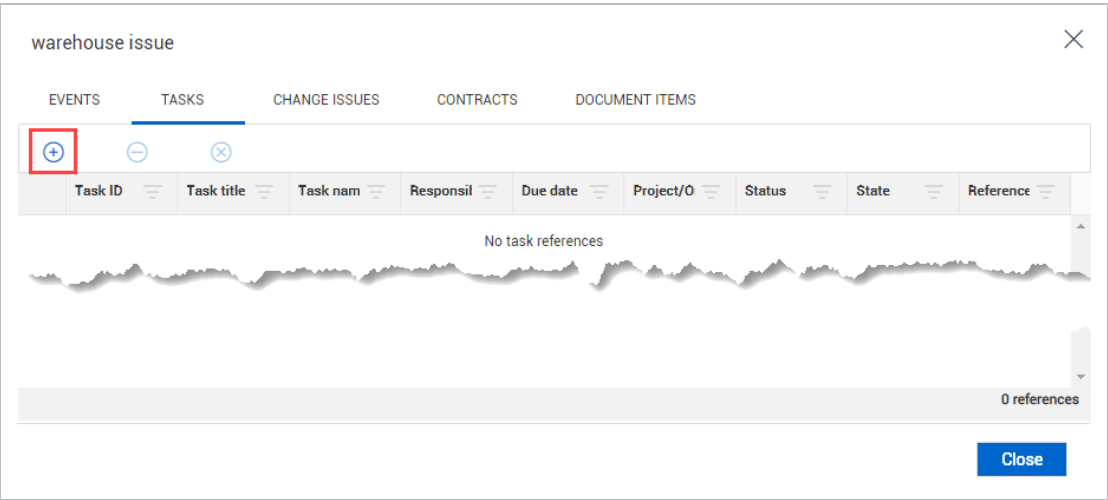
5.4 Step by Step 8 — View and edit references

- 1. In the Form information slide-out, click **References**.

The References dialog box opens where you can view and add references.



- 2. To add a reference, select Events, Tasks, or other available tabs, and then click the **Add References** icon.



NOTE

Integration is available with InEight Change, InEight Contracts, and InEight Document.

The Add References dialog box opens.

3. Select the **Events** or **Tasks** or other available tabs, and then select events or tasks to be referenced.

Add References ×							
EVENTS				TASKS			
	Task ID	Category	Task name	Task title	Responsible pi	Due date	Project/Organi
☒	2023032400001	Subcontractor Iss...	Task test for SUB	SDAAsdASD			Steel Structure Tr...
☐	2022090200001	Inspections			Karen	09/02/2022	C-XYZ (RootOrg1)
☐	2022090100009	Inspections			Karen	09/02/2022	C-XYZ (RootOrg1)

4. To remove references, select the reference, and then click the **Remove references** icon.
5. After editing references, select **Close**.

NOTE

In Tasks, you can use the Delete task option to delete tasks.

In the References dialog box, a column named **Reference type** will show information on the reference association.

EVENTS TASKS CHANGE ISSUES CONTRACTS DOCUMENT ITEMS									
	Event ID	Event title	Form name	Reporter	Event date	Project/Organiz	Status	State	Reference type
☐	2023032700009	Form Flow - SUB u...	Form Flow - SUB u...	Karen	03/27/2023	Steel Structure Tra...	Pending	InProcess	External reference

The Reference type column can have the following values:

- **Associated form** – Started from a form or task button from within the form or task.
- **Internal reference** – Associated with a reference question.
- **External reference** – Associated by using the Add References button in the reference dialog box.

History for events and tasks

You can view the history of changes for events or tasks. You can sort and filter the list view.

5.4 Step by Step 9 — View form history

1. In the Form information slide-out, click **History**.

The history page opens where you can view changes made to the event or task.

History							×
Change type	Question/Option	Section	Old value	New value	Change date	Changed by	
Answer	Did the tour result in a next step?	TOUR INFORMATION		No, there is no next step needed.	03/27/2023 11:21 AM	Karen	
Answer	Update	TOUR INFORMATION		Karen 27/03/2023 11:21 AM	03/27/2023 11:21 AM	Karen	
Answer	Who gave the tour	TOUR INFORMATION		Karen	03/27/2023 11:21 AM	Karen	
Answer	Date & Time of the tour	TOUR INFORMATION		03/27/2023 12:00 AM	03/27/2023 11:21 AM	Karen	
Answer	Name(s) of non-employees on the tour:	TOUR INFORMATION		John	03/27/2023 11:21 AM	Karen	
Answer	Name of Company that was given the tour:	TOUR INFORMATION		JT Company	03/27/2023 11:21 AM	Karen	
Status	Not applicable	Not applicable		Manager Review	03/27/2023 11:21 AM	Karen	

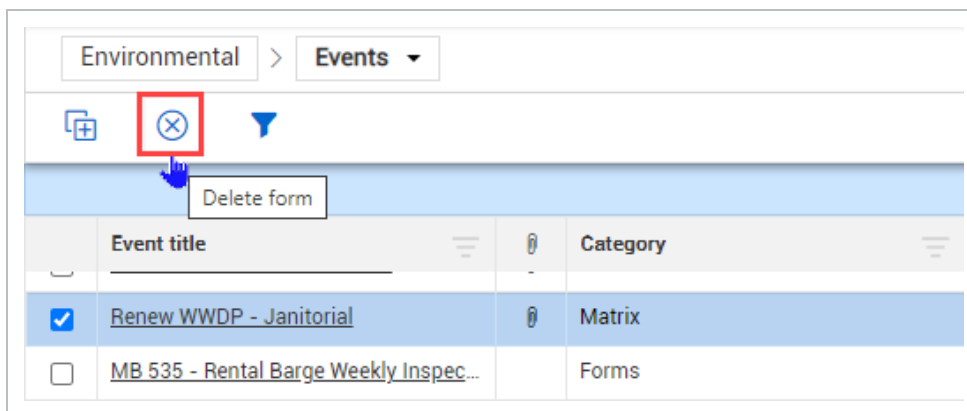
Close

2. Click **Close** when done viewing.

NOTE You must have permission to view the History dialog box.

5.4.1.6 Delete an event or task

To delete an event or task, select events or tasks, and then click the **Delete** icon.



NOTE Your role must contain permission to delete.

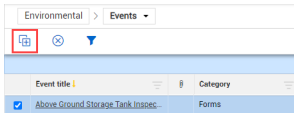
5.4.1.7 Copy an event or task

The ability to copy a task, or an event, along with its associated tasks and attachments, is useful when you have many tasks and attachments that mimic the last event, such as an environmental permit

event. You can copy one event at a time or multiple tasks at the same time.

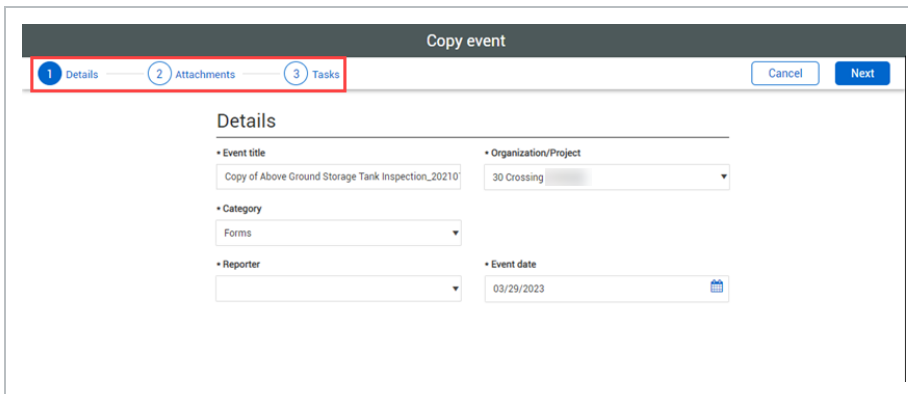
5.4 Step by Step 10 — Copy event or task

1. In the **All events** or **All tasks** list page select an event or tasks to be copied, and then click the **Copy form** icon.



When you copy one or multiple items from All tasks, the copied tasks are created with *COPY OF* in front of the task title.

When you copy an event from All events, the Copy event page opens to edit form details, attachments, and tasks.



2. In the Details page, you can edit the copied event, and then click **Next**.
3. In the Attachments page, you can uncheck any existing attachments to remove them, and then click **Next**.
4. In the Tasks page, you can uncheck any existing tasks to remove them, and then click **Next**.
5. Click **Copy** to create a copy of the form.

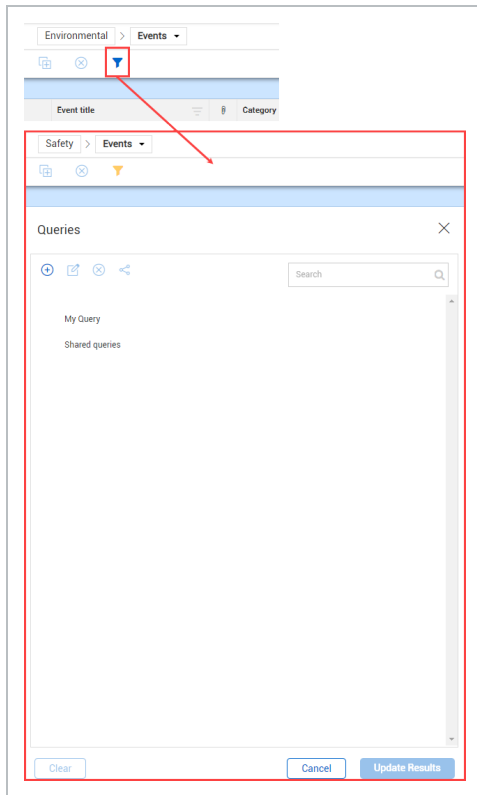
5.4.1.8 Query builder

The Query builder feature can be used on event and task list pages. It provides a more granular filtering and querying option for events and tasks. These filtering options are an alternative to the options found in the grid page columns.

5.4 Step by Step 11 — Using the query builder

1. Click the Query Builder icon.

The query builder dialog box shows.



In the query builder you can add, edit, delete, and share queries. Your saved queries are listed under the My Query menu, and your shared queries are listed under the Shared queries menu.

NOTE Queries can only be shared with users in the same project.

2. Click the **Add** icon to add a new query, and then enter the conditions to your query.
3. Click **Apply**.

You can then use the Reset, Cancel, and Save Query buttons at the bottom of the query window. If you update an existing query, you can save the new query using the Save Query As button.

Query builder column condition choices are dependent on events or tasks. For example, if you select Events, you see column choices that are related to events.

Query Builder

Column	Operator	Value
And - Select one -	- Select one -	
And - Select one -	- Select one -	
And - Select one -	- Select one -	
And - Select one -	- Select one -	
And - Select one -	- Select one -	
And - Select one -	- Select one -	
And - Select one -	- Select one -	

Reset

Cancel

Save Query

Save Query As

Apply

NOTE

You can enter up to seven conditions in a query.

5.4.1.9 Views

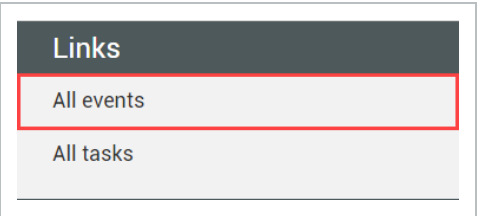
For more information on how to save and send views and use the Global Events/Tasks option, see [Event and Task Views](#).

5.4.2 Managing events and tasks

5.4 Step by Step 12 — Manage an event

- 1. From the Compliance landing page, select a **module** card.
- 2. Select the **All events** link.

All events and tasks links are shown under Links in the upper left side of the page.



- On the Events page, select an event or task that requires additional review based on business process requirements. For example, an event with a pending status.

Event ID	Project/Organization	Category	Form name	Event title	Reporter	Event date	Status
2019101100004	S100000 - PKS Inc	Incident	Project Manager Safe...	Johnson Branch facili...	Karen Loftus	10/09/2019	Manager Review

- Advance the event or task to the next form flow step, as required.
- The status of the event will update depending on how your form workflow is setup.

Managing tasks follow a very similar process, as shown below.

5.4 Step by Step 13 — Manage Tasks

- Select the **All Tasks** link on the left side of the page.



- Select a task by clicking on a **Task title**.
- Advance the task to the next form flow step, as required.

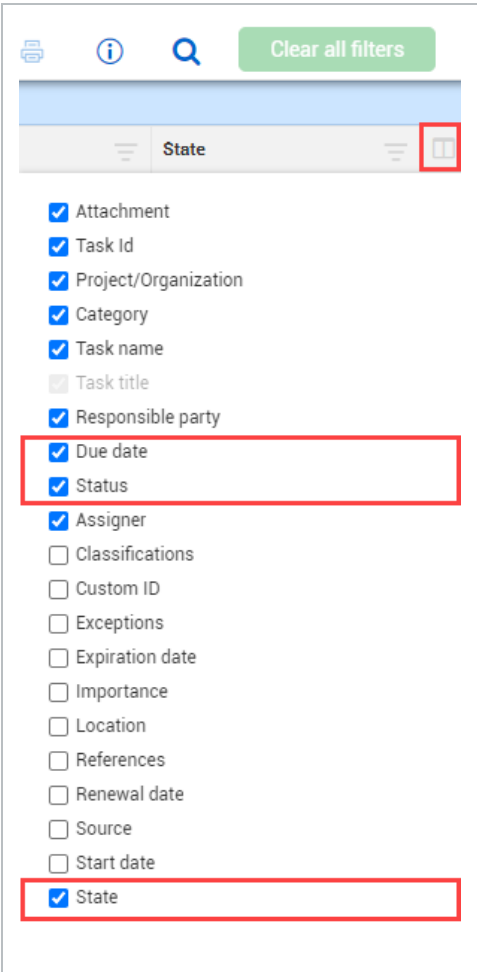
5.4.2.10 Monitor due dates, overdue states and statuses

You can monitor the events or tasks due dates, states, and status, and their adherence.

5.4 Step by Step 14 — View due dates, overdue states and statuses

- From a module landing page, click **All tasks**.
You can also go to **All events**.
- In the tasks page, find the Due date (or Event date for events), Status, and State columns.

Click the **Column chooser** icon to add the columns if they are not in the view.



3. Click the **Column chooser** again to close.

An overdue event or task will make the Due date and State columns turn red. An overdue email

is also automatically triggered.

Due date	Status	State
02/01/2023	Scheduled	Overdue
02/23/2023	Scheduled	In Process
03/01/2023	Scheduled	In Process
02/17/2023	Scheduled	In Process
01/31/2023	Scheduled	Overdue
02/24/2023	Scheduled	In Process
02/28/2023	Scheduled	In Process
02/08/2023	Scheduled	Overdue
02/08/2023	Scheduled	Overdue
02/09/2023	Pending	Saved
03/07/2023	Scheduled	In Process
02/07/2023	Pending	Saved
01/25/2023	Pending	Saved

NOTE

The State column changes to Overdue after the due date.

5.4.2.11 Monitor form flow status

When an event has an active form flow, you can click its Status column to open a dialog box with detailed information about the current status of the form flow.

The current status box has the following areas:

North Bridge Foundation

CURRENT STEP

1 Step 2
Quality Review

STATUS

2 Pending

STATE

3 In Process

DAYS UNTIL OVERDUE

4 5

TOTAL DAYS OPEN

5 8

ESTIMATED COMPLETION DATE

6 11/13/2018

1. Form Initiated
Start date: 10/31/2018

Abby Carter
Original Reporter

2. Quality Review
Due date: 11/13/2018

Karl Jensen
Site Auditor

Jimmy Crammer
Site Auditor

Jennifer Bard
Site Auditor

Michael Lowe
Site Auditor

Sondra Keppler
Site Auditor

Louis Brown
Site Auditor

Mary Johansen
Site Auditor

7

3. Client Concurrence
Due date: 11/19/2018

Amy Peterson
Project Engineer

Jeff Singleton
Project Engineer

Donald Thorton
Project Engineer

4. Close and complete workflow
Due date: 11/21/2018

Sarah Montgomery
Administrator

Steven Taylor
Administrator

Monica Bremmer
Administrator

Jamie Conner
Administrator

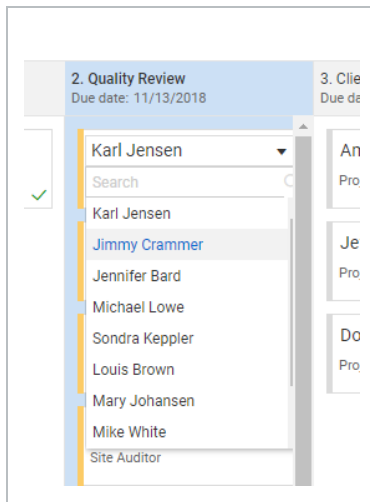
	Description
1	Current step.
2	Current status.
3	Current state.
4	Number of days until the form flow step becomes overdue.
5	Total days the form has been open.
6	Estimated form completion date.
7	All steps and their responsible parties.

For each step you will see the step name, start date, responsible parties, and their roles.

Responsible parties have colored bars according to their sign-off status for each step:

Color	Description
Green	Complete
Yellow	Pending
Red	Overdue
Grey	Step not started

You can select different users to be responsible parties, depending on how a step is set up. The ability to select different responsible parties allows for updating users who no longer participate in the project, their roles have changed, etc.

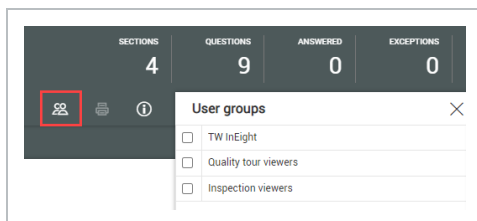


5.4.2.12 Assign user groups

At the project level, you can give user groups permission to view events or tasks. User groups must first be set up for the project. For information on setting up User Groups, see [User Groups](#).

5.4 Step by Step 15 — Assign user groups to an event or task

1. Open the event or task, and then click the User groups icon in the upper-right of the page.



2. In the **User groups** side panel, select the groups you want to give permission to.
3. Click **Save**.

5.5 EVENT AND TASK VIEWS

You can filter, sort, and arrange columns in the Events and Tasks pages. The updated view can be saved for quick access. Views can also be sent to other users to view outside the current organization and

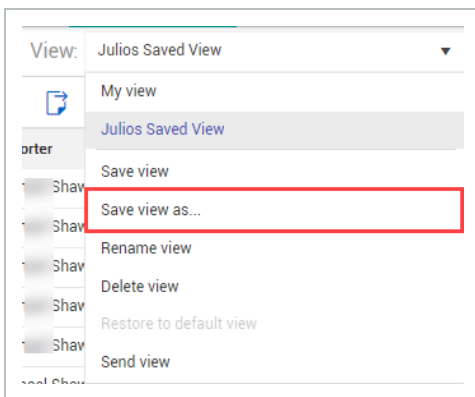
project. In the module landing page, you can access the All events or All tasks pages links, under Links in the upper left of the page.

5.5.1 Save views

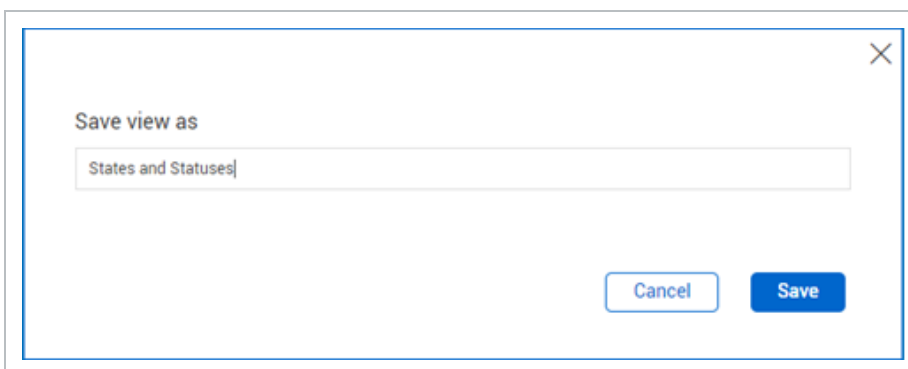
After you filter, sort, or arrange your view, you can save the updated view to easily access it in the View list.

5.5 Step by Step 1 — Save your view

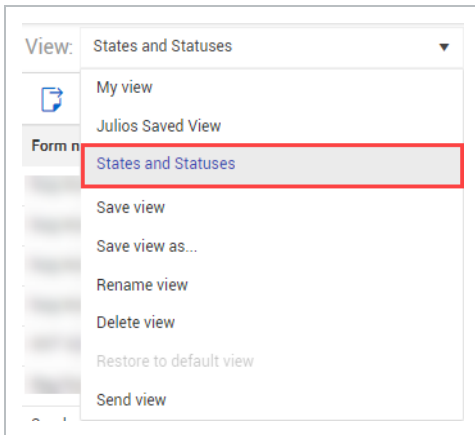
1. Click the **My view** drop-down, and then select **Save view as....**



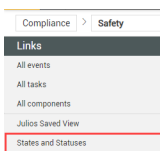
2. In the **Save view as** dialog box, enter the view name, and then click **Save**.



You can access the saved view in the My view list.



When a saved view is created, it is also available under Links at the top left of the module landing page.



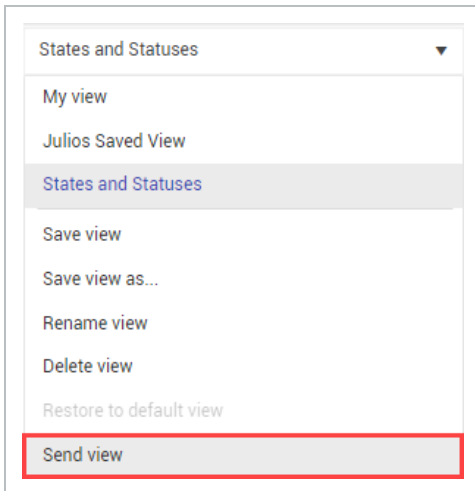
5.5.2 Send a view

You can send your saved view to others. When you send a view, you are sending the organization, project, and applied filters defined by the view, not the exact same forms and tasks that you can see.

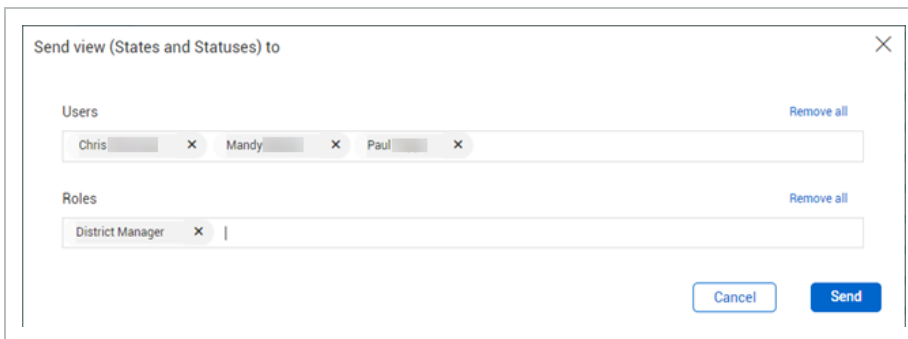
What receiving users see depends on their permissions. If they do not have permission to view forms or tasks within the parameters, they cannot see them.

5.5 Step by Step 2 — Send view to another user

1. Click the **My view** drop-down menu, and then select your saved view.
2. Click the **My view** drop-down, and then select **Send view**.



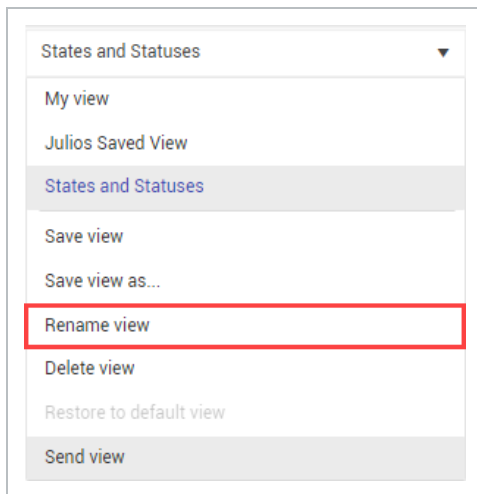
3. In the dialog box, select the users and roles to whom you want to send the view, and then click **Send**.



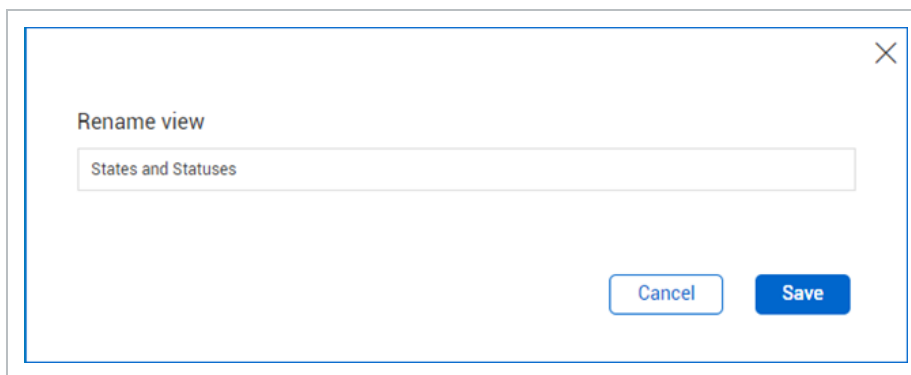
5.5.3 Rename view

5.5 Step by Step 3 — Rename view

1. Click the **My view** drop-down menu, and then select your saved view.
2. Click the **My view** drop-down again, and then select **Rename view**.

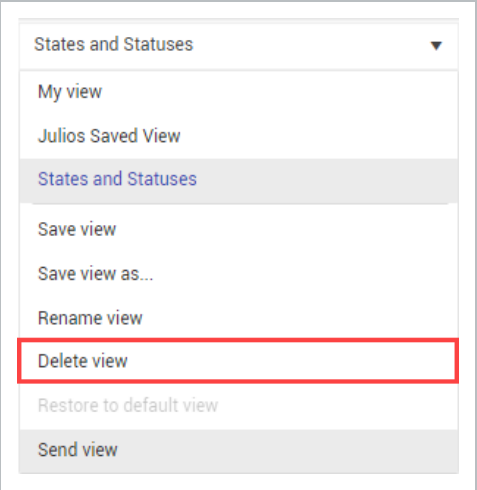


3. In the dialog box, rename your view and then click **Save**.

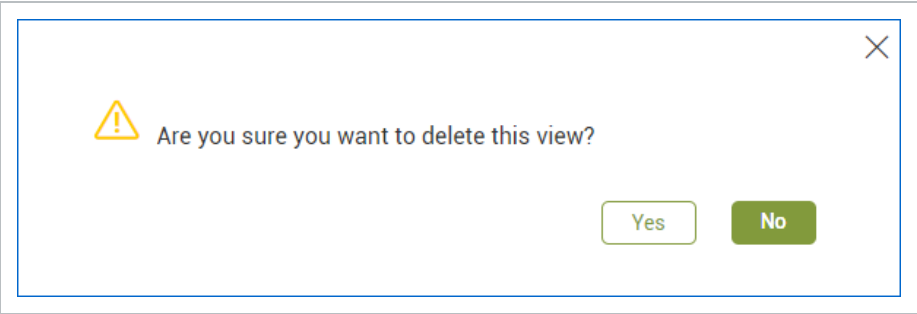


5.5.4 Delete view

1. Click the **My view** drop-down menu, and then select your saved view.
2. Click the **My view** drop-down again, and then select **Delete** view.

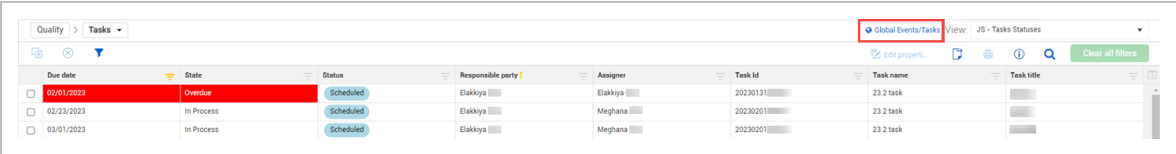


3. In the dialog box, click **Yes** to delete view.



5.5.5 Global view

Global Events/Tasks view lets you see events and tasks outside of the organization or project you are currently viewing. To show the Events or Tasks page in global view, click **Global Events/Tasks** at the top-right of the page.



In the global events and tasks page, you can narrow or expand your view using the query builder in the side panel. You can narrow or expand according to module, organizations, and projects you are assigned to.

< Back

Events ▾

×

Filters

⏪

Module

×

Organization/Project

Clear

🔍

✓ ☒ C-XYZ (RootOrg1)

Select all

Deselect all

☒ Steel Structure Training Job (105091)

☒ Steel Structure Training Job 2 (105092)

☒ Steel Structure Training Job 3 (105093)

☒ Steel Structure Partner Job (105094)

☒ Training Job (Training Job)

☐ Wards Island WWTP (183850)

☐ Heavy PM Estimate (Heavy PM Estimate)

☒ BMS Test (BMS Test) (BMS Test)

^ ☒ C-XYZ-ND (EO-ID)

Select all

Deselect all

^ ☒ C-XYZ-SD (EO-ID-1)

Select all

Deselect all

^ ☒ C-XYZ-OSD (EO-ID2)

Select all

Deselect all

Reset

Apply

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COMPLIANCE MOBILE

Lesson Duration: 30 minutes

Lesson Objectives

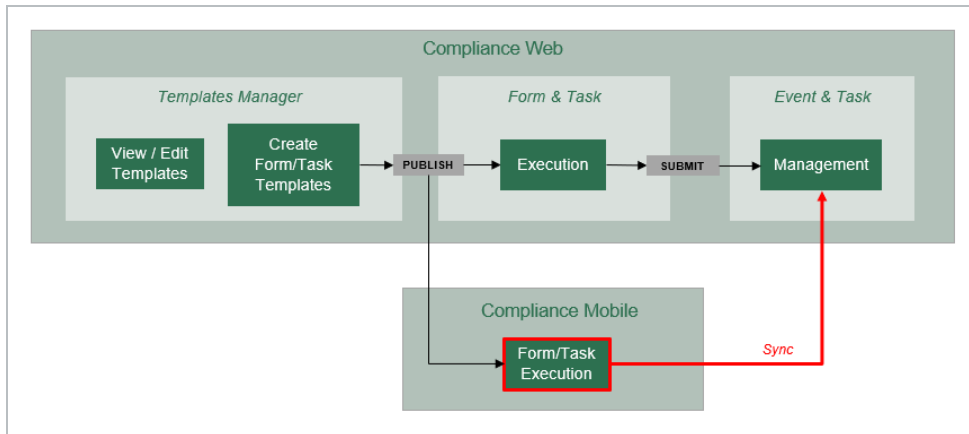
After completing this lesson, you will be able to:

- Complete a Compliance form and task on a mobile device
- Sync a form back to the Compliance web application

Topics in this Lesson

6.1 Compliance Mobile Navigation	212
6.2 Filling out an Event or Task - Mobile	219
6.3 Complete a Form or Task on Mobile	238
6.4 Locked Events and Tasks	241
6.5 Sync	242
6.6 Push Notifications	244

6.1 COMPLIANCE MOBILE NAVIGATION

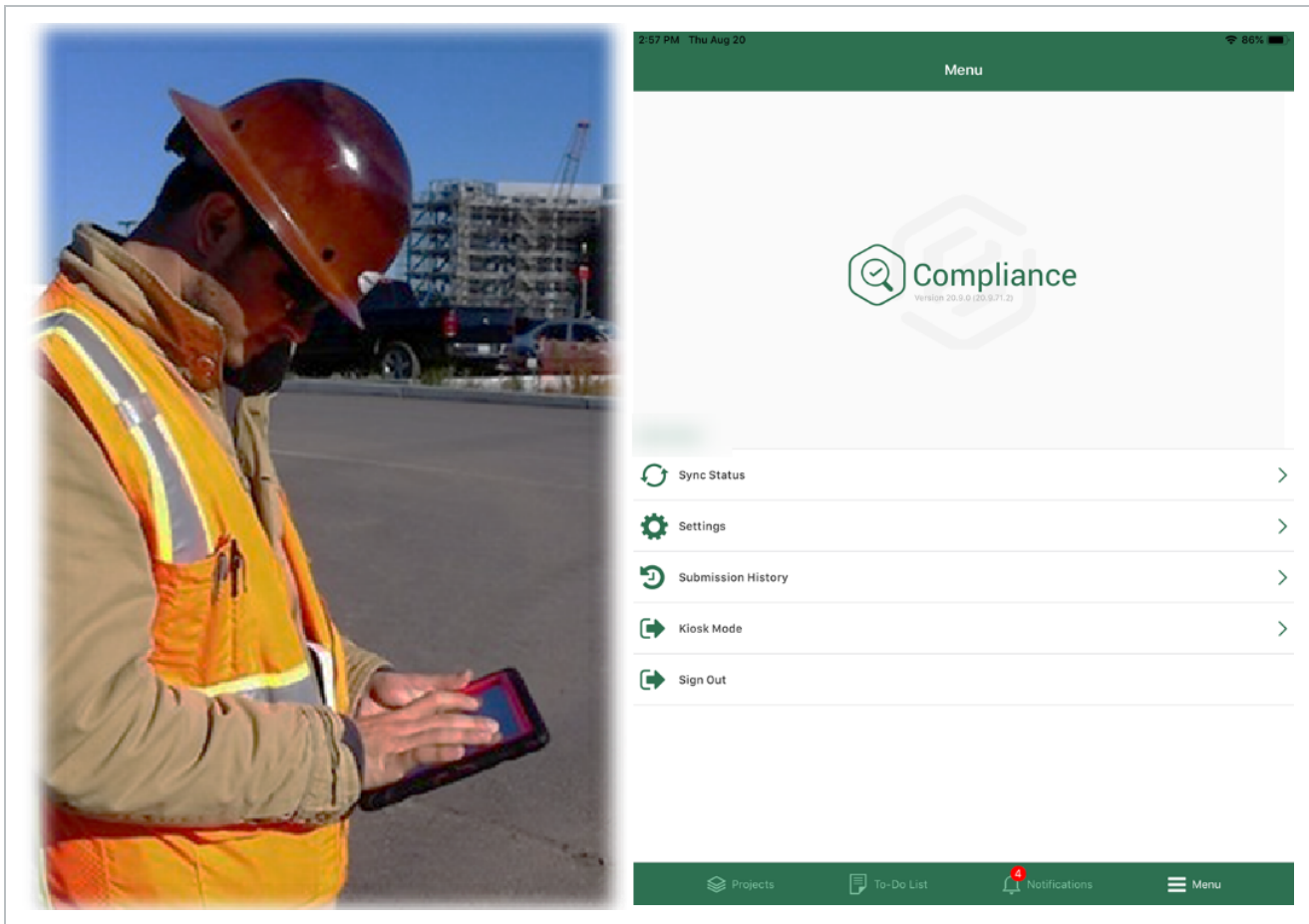


Scenario

The templates have been set up and work is beginning in the field. As sections of the structure are assembled, torque-up crews finishing areas need you to complete inspections for each connection point. These inspections are considered the final step of the process and will be recorded in the project turnover documentation.

The Compliance application allows users to incorporate technology when completing inspections and tasks instead of a traditional method of using a paper form.

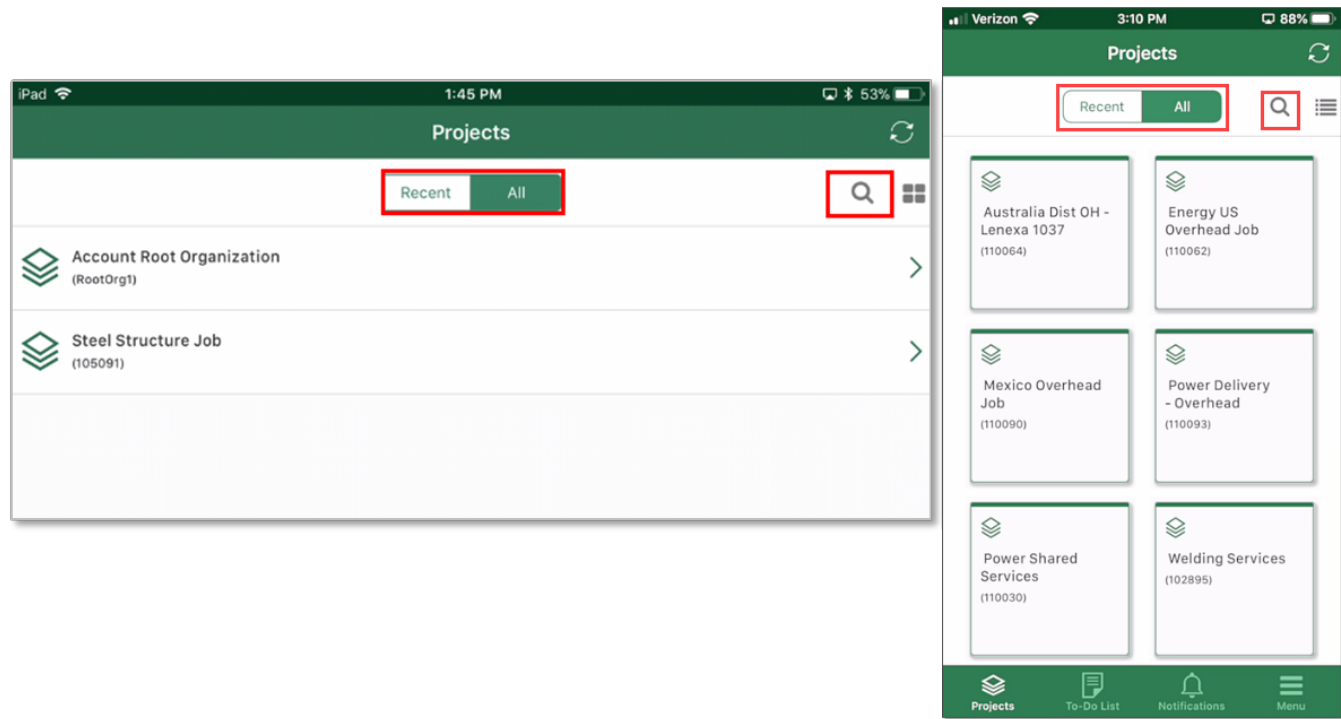
You can perform inspections or complete tasks using the Compliance mobile application on an iOS device by utilizing the forms, questionnaires and tasks created within Compliance web application. You can complete the relevant inspection task or form, online or offline, and synchronize the results when connected to an applicable network.



You can easily locate the relevant Tasks or Forms based on your project assignment. You access the Compliance application using your iPhone or iPad device. When you first log in, you will open up to the Projects home page. At the Projects home page, you can select any project that you are assigned to. On the top of the screen you will see two buttons; Recent and All. When these buttons are selected you will either view all of the projects available or projects which were recently opened. This screen also gives you the option of searching for a project.

TIP

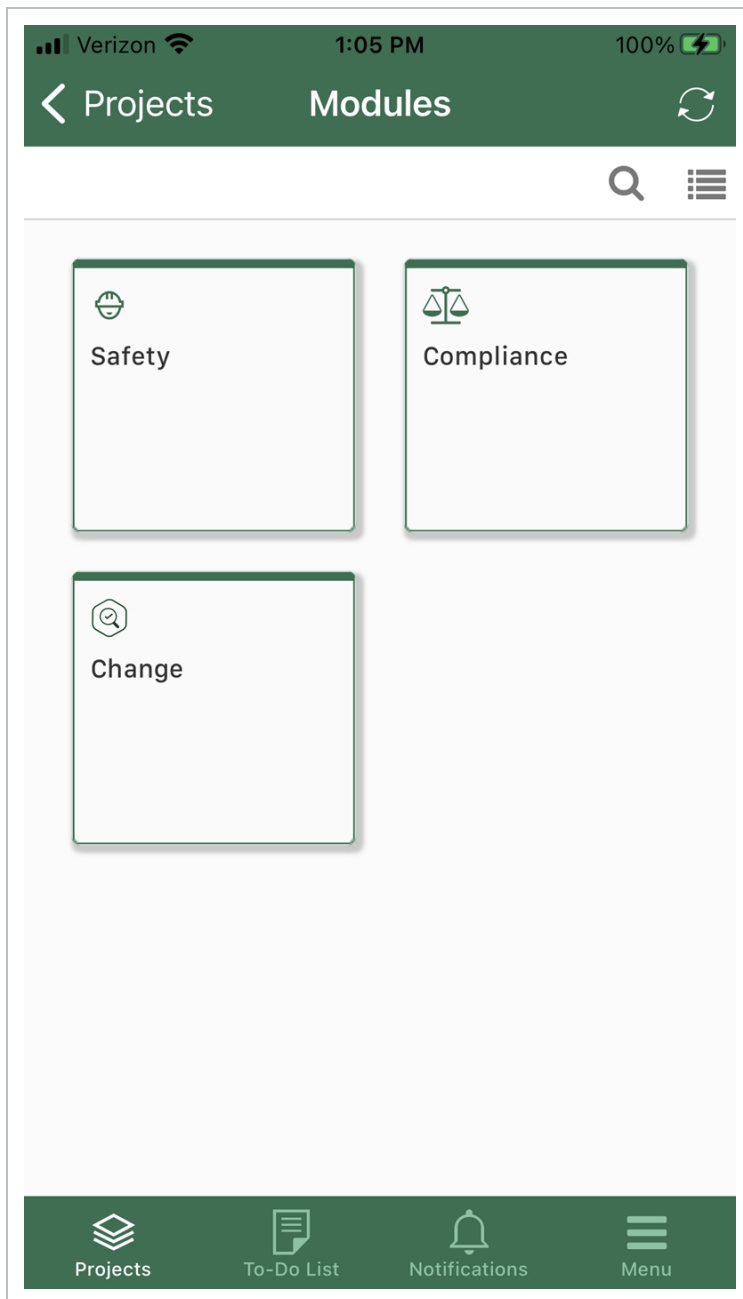
The mobile app saves your password for quicker log-in.



NOTE You can have up to 6 recent projects. When you sync it is only the recent projects information that will get updated.

TIP You can remove a job from the recent tab by touching and holding it until it shows an X for deletion.

When you select a project tile or list, it opens the modules’ screen. All modules listed on your device are given through permissions on the Compliance web application. If you would like to look at the names of the modules as a list, simply touch the icon. This option is available on every page.



Also, at the top of your screen is the Sync icon. When touched it will sync the latest information from the website if you are in a connected environment.

NOTE

The mobile device does work in an unconnected environment. If you have done a sync to download project information while connected.

At the bottom of the screen are four icons; Projects, To-Do List, Notifications and Menu. When selected these will open other screens on the mobile application which will help you navigate to all

your permission-based projects, give you a list of forms/tasks which still need to be completed and a menu for statuses of syncing and a history of submissions.

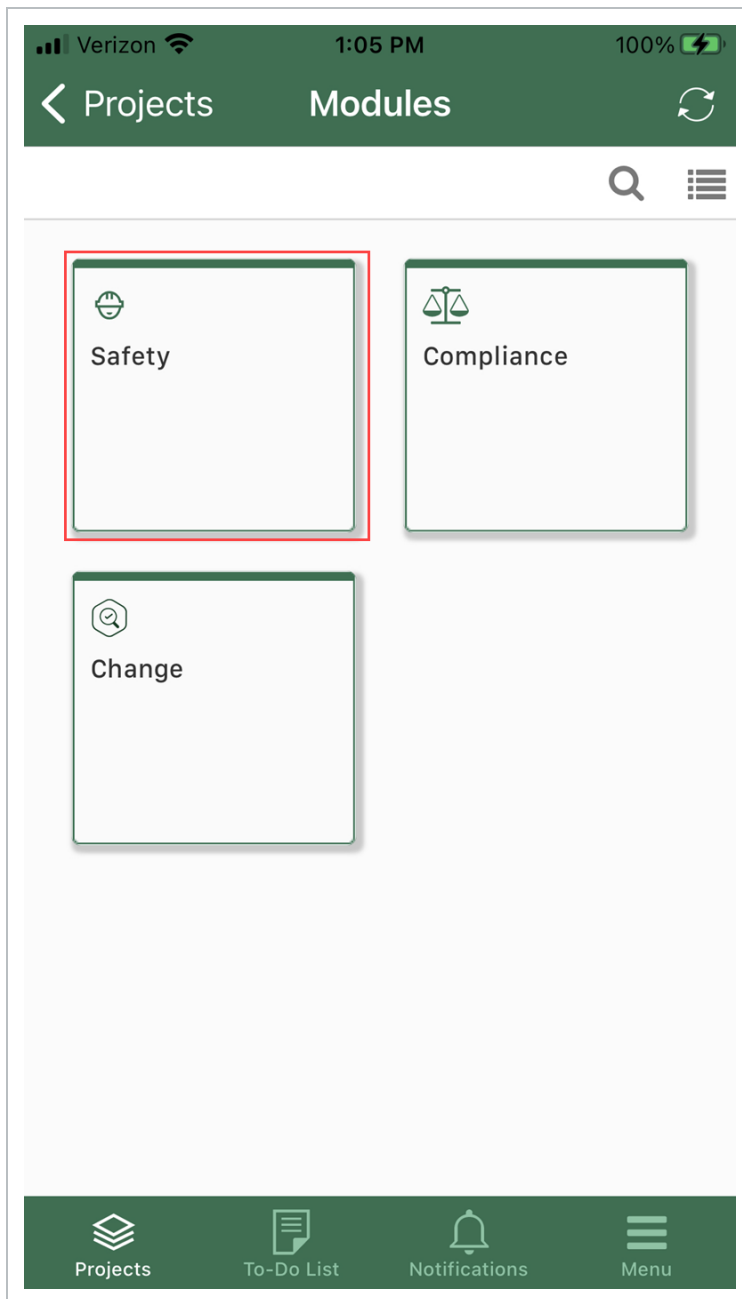
**TIP**

If you have been assigned a task it will show up in your **To Do** list under the assigned toggle.

Mobile Application - 4 icons

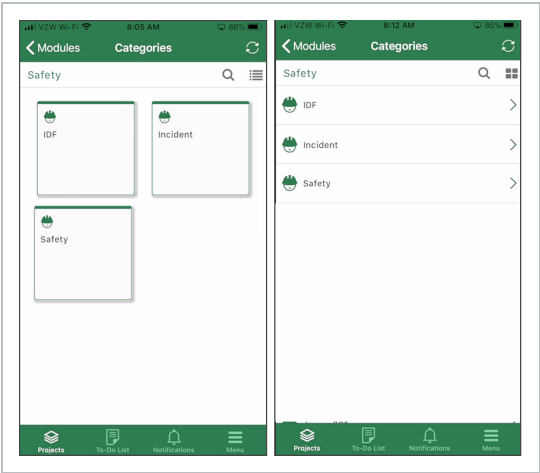
Name	Description
Projects	Lists and gives access to all the projects for which you have permissions.
To-Do List	Shows the items which need attention.
Notifications	Sends notifications with messages to specific users, roles, projects or organizations.
Menu	Enables you to view the submission history of all the items which you have completed and synced off of that device for a user for the past 30 day.

On the Module landing page, select the **Safety** tile (or list item in list view).

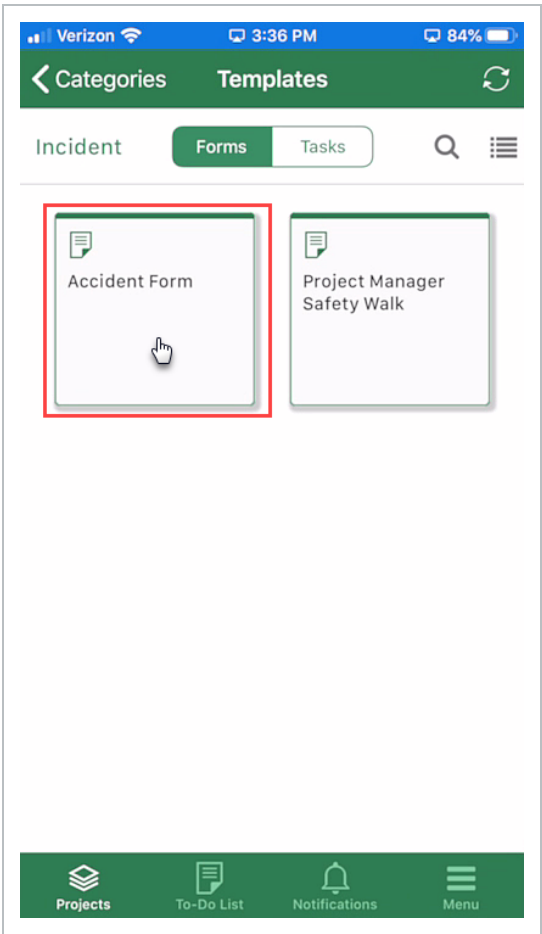
**NOTE**

Categories can be shown in the list view or tile view.

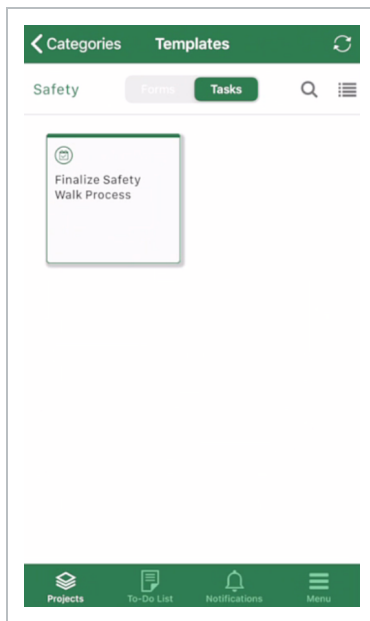
When you select a module, the categories are made available for you in that module. Select a tile, in our case the **Incident** tile.



Now the selected template opens. Select a form, in our case the **Accident Form**.



The Accident form opens. Now you are ready to fill out the form.
After toggling over to the Tasks function, accessing a task follows the same basic process.



6.1.1 Kiosk Mode

Kiosk mode limits mobile functionality to filling out and submitting forms or tasks without requiring users to sign in. Kiosk mode is useful if your project has subcontractors who may not be users in your system, but who need to report information.

To start kiosk mode, go to Menu > **Kiosk mode**, and then turn on the toggle.

If you want to limit kiosk mode to a default project, module, or category, you can set those in Menu > **Settings** when kiosk mode is off. After you set defaults, and then turn on kiosk mode, you can only see forms within the default settings.

TIP

You might find it useful to create a category for only the forms and tasks you want to see in kiosk mode. You can then set this special kiosk mode category to be the default.

6.2 FILLING OUT AN EVENT OR TASK - MOBILE

TIP

Mobile tasks have all the same abilities as using tasks on the web with the added ease and efficiency of offline use.

When filling out a form or task, the top of the page shows the following information:

- **Sections** – The number of sections. Tap this number to open a slide-out panel of sections that you can navigate to without scrolling.
- **Questions** – The total number of questions.
- **Answered** – The number of questions answered.
- **Exceptions** – The number of answers flagged as exceptions. Tap this number to open a slide-out panel of questions answered with exceptions. You can go to those questions by tapping them in the panel.

Sections	Questions	Answered	Exceptions
1	4	0	0

General Information

Next to the header numbers is the Information icon. When you tap this icon, a slide-out panel opens that provides more information about this event, which functions the same way with a task.

In the below example, there are four questions on this event, three of which are answered.

Accident Form

QUESTIONS ANSWERED
3/4

* Date: Jan 16, 2020

Proj/Org: Appomattox Topsides

Category: Incident

Event date: 01/16/2020

Status: --

Reporter: Karen Loftus

Event title: Accident Form

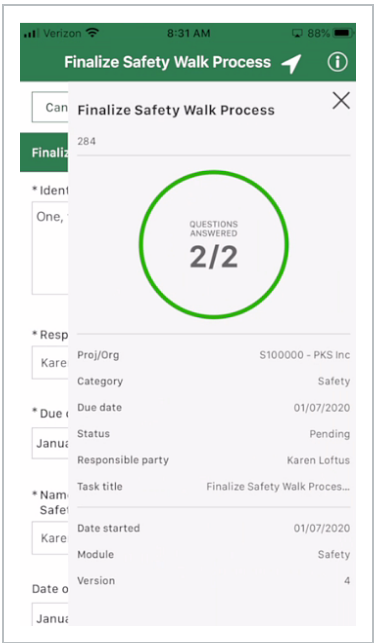
Date started: 01/16/2020

Module: Safety

Version: 2

This page also provides you with the project and organization information, the category, event date, status, reporter, event title, start date, module and version. To close this, click the **Information** icon again or click the **Close** icon at the top right of the page.

In the same manner as on the web for a task, the **Information** icon shows the project/organization, category, due date, status, responsible party, task title, date started, module, and version number.



Some questions on an event or task might be mandatory. They are denoted with an asterisk (*). On some occasions, an Information icon provides more information. When selected, they provide information such as cautions or general information to help you complete the event or task.

VZW Wi-Fi2:44 PM74%

Accident Form

Cancel

Save

Accident Information

Description of the accident

On Friday morning I ran into

172 characters remaining

* Date of incident

Time the incident occurred

Specific location where the accident occurred

4000 characters remaining

< Back

Details

Description of the accident

Please do not includes individuals names in this field

You can use voice dictation within the Compliance mobile application. Select the microphone from the keyboard on the screen and speak.

File View Help

VZW Wi-Fi 2:29 PM 77%

Accident Form

Cancel Save

Accident Information

Description of the accident i

200 characters remaining

* Date of incident 📅

Time the incident occurred

Q W E R T Y U I O P

A S D F G H J K L

⬆ Z X C V B N M ⬅

123 🌐 🎤 space return

The dictation will be transferred to the area you selected, making it convenient to fill out the event or task without the keypad.

File View Help

VZW Wi-Fi 2:30 PM 77%

Accident Form

Cancel Save

Accident Information

Description of the accident ⓘ

On Friday morning I ran into

172 characters remaining

* Date of incident

Time the incident occurred

6.2.1 Copy a Section

Depending on how the form or task template is set up, you might be able to copy a section. If the copy option is enabled, use the Copy section button in the section header to copy the section below the current section.

NOTE

The Copy section button might have a different name, depending on how the form or task template was set up.

You can also tap the **Remove** icon to remove a copied section.

Crew Information

Select crew member

Crew Information

+

Copy section

−

Select crew member

6.2.2 Question Types

6.2.2.1 Date – Time

Your event or task might include a field to indicate the date and time and allows for collection of date and time either together or separately.

Select a date field, in this case the **Date the incident occurred**. Scroll to the date you want, and it is shown under the date of the incident.

VZW Wi-Fi2:50 PM73%

Accident Form

Cancel

Save

Accident Information

* Date of incident

October 15, 2019

Time the incident occurred

Specific location where the accident occurred

July	12	2016
August	13	2017
September	14	2018
October	15	2019
November	16	2020
December	17	2021
January	18	2022

The Time question defaults to the time at your current location. Use the scroll bar to move to the time in AM or PM for your selection.

VZW Wi-Fi 2:54 PM 72%

Accident Form

Cancel Save

Accident Information

On Friday morning I ran into a post while walling back to my rig

135 characters remaining

* Date of incident

October 15, 2019

Time the incident occurred

2:00 PM

11 57
12 58
1 59 AM
2 00 PM
3 01
4 02
5 03

6.2.2.2 Choice

This is used for options like yes/no, pass/fail, accept/reject. These questions are a radio button or icon.

CONCRETE FOUNDATION RELEASE

Cancel Save

CONCRETE FOUNDATION RELEASE

COMPRESSIVE STRENGTH MEETS, OR WILL MEET, SPECIFIED 28 DAY STRENGTH

☒ ☐

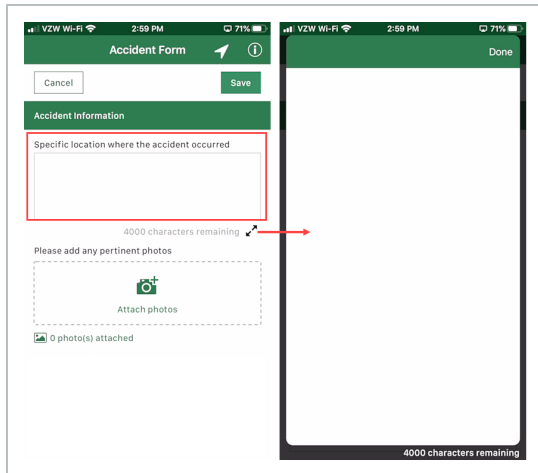
CONCRETE SURFACE: FLATNESS; HI/LO; SLOPE; FINISH; PREPARATION FOR GROUT; CLEANLINESS

☒ ☐

6.2.2.3 Text

Areas in the event or task that capture free text in short (250 characters) or long form (4,000). For example, this can be used for descriptions, short descriptions, explanations, names of subcontractors, and locations.

There are also large text fields. In this example, it's the **Description of the incident**. Clicking on the double arrows expands the box for you to continue typing or use the microphone to dictate.



TIP

On free text fields, the mobile application opens a full page for efficiency.

6.2.2.4 People Picker

A people picker is available to use to select those users that have access to the module at the organization level in which the event or task is being performed against.

To access the names, begin typing the name or select the **People Picker** icon. Depending on how the administrator sets up the question, you can select multiple users or none, and the list of users can include either only users with Compliance roles or all users in the project.

A new page is shown with the names of users. Select the name and it appears in the indicated field on the event or task.

Depending on how the question is set up, the selected user can receive an email notification.

The left screenshot shows the 'Incident form' with the following fields and options:

- Incident Information:** A text area containing 'Tripped and fell on a rock bed while carrying a load of hardware.' with a character count of 35/35 remaining.
- Was anyone injured during this incident?** Radio buttons for 'Yes' (selected) and 'No'.
- Is the injured party internal or external to the project?** Radio buttons for 'Internal' (selected) and 'External'.
- Name of the injured party:** A text field with a red box around the 'Add' icon.
- What time did the injured party start work on the day of the incident?** A time picker.
- Please add any pertinent photos:** A section with an 'Attach photos' button and a status '0 photos attached'.
- Incident Details:** Radio buttons for 'First Aid' (selected), 'Lost Time', and 'Restricted Duty'.

The right screenshot shows the 'People picker' screen with a list of users:

- B**
 - bhavna gupta
bhavna.gupta@ineight.com
 - Brandi Heffner
Brandi.Heffner@INEIGHT.COM
 - bridgette quintero
bridgette.quintero@ineight.com
- P**
 - paul bennion
paul.bennion@ineight.com
- S**
 - Susan Cappelloni
Susan.Cappelloni@INEIGHT.COM

NOTE

The people who show in the list are the users who have a Compliance assignment to the project for which the event or task is being filled out.

6.2.2.5 Attach Photos

The Compliance mobile application lets you to take photographs and annotate on the areas of focus while filling out the event or task. In the application, select **Attach photos**. It opens a page from which you can select an option from the Photo Library or Take Photo with your smart phone.

For example, you might attach reconstruction photos of safety incidents, photo proof of a fix to a non-conformance, or a picture of a certification of compliance.

VZW Wi-Fi 3:04 PM 70%

Accident Form

Cancel Save

Accident Information

3969 characters remaining

Please add any pertinent photos

Attach photos

0 photo(s) attached

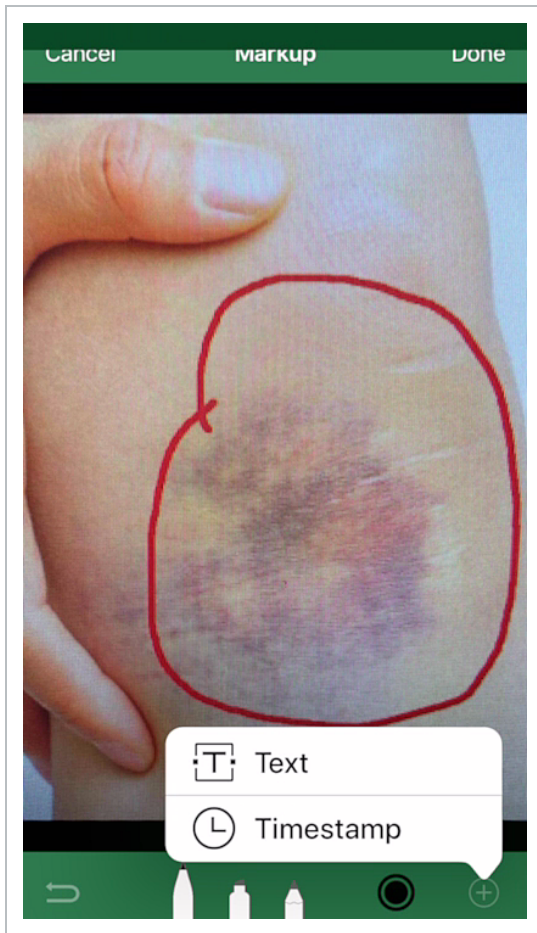
* Manager's signature

Photo Library

Take Photo

Cancel

After the picture is taken, you can edit the photo by selecting the **Edit** button on the top right of the page. This opens editing and annotation options. There are colors, widths, and text options available. A time stamp is added when edits are made, and the stamp can be moved around the screen for optimal viewing. You can also edit the name of the image file to be more meaningful than the default name given by your device.



Prior to the image being saved, the Undo icon in the lower left removes edits.

When finished, tap **Done** and return to the event or task page. Here you see the photos you included. If you want to view the photo, select the image and it takes you back to the photos. Alternatively, if you want to include more photos, tap **Attach photos** again.

VZW Wi-Fi 3:11 PM 69%

Accident Form

Cancel Save

Accident Information

3969 characters remaining

Please add any pertinent photos

Attach photos

1 photo(s) attached

* Submit form

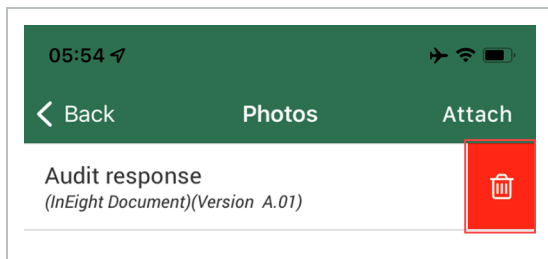
If you have set up integration with InEight Document, you can also see if supporting documents from the Document application are attached when performing a form or task. Document links are shown in the list of attachments with the Document icon and document version numbers.

05:54

< Back Photos Attach

Audit response
(InEight Document)(Version A.01)

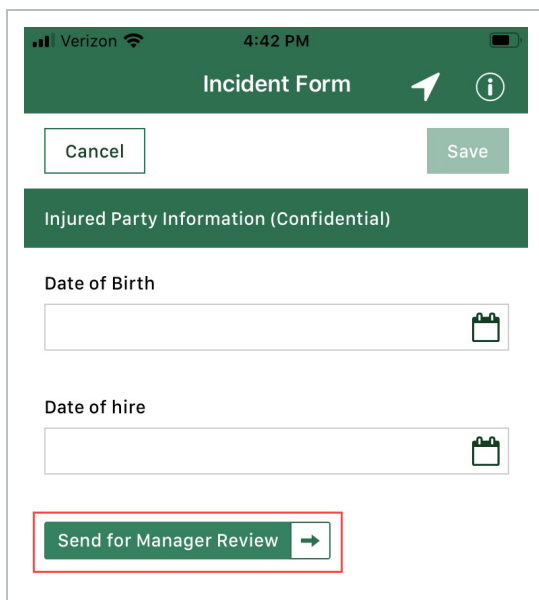
To remove an attachment, swipe left, and then tap the **Remove** icon.



6.2.2.6 Form Flow

A form flow button can complete the first step of a form flow from the mobile application. Additional steps must be completed by responsible parties in the Compliance web application.

Form flow buttons have a right arrow next to them.



6.2.2.7 GPS

A GPS question lets you provide your location by tapping **GPS** or by entering your coordinates directly in the fields. You can also tap **Clear GPS** to remove the information if you need to enter a different location.

To use the GPS button on your mobile device, you must allow the Compliance app to access your location when prompted.

NOTE

If you enter GPS coordinates automatically, you cannot manually edit the coordinates.

6.2.3 Complete a Form or Task

For more information on how to save and submit a form or task, see [Complete a Form or Task](#).

The following steps walk you through performing an event on a mobile device.

6.2 Step by Step 1 — Fill Out an Event - Mobile

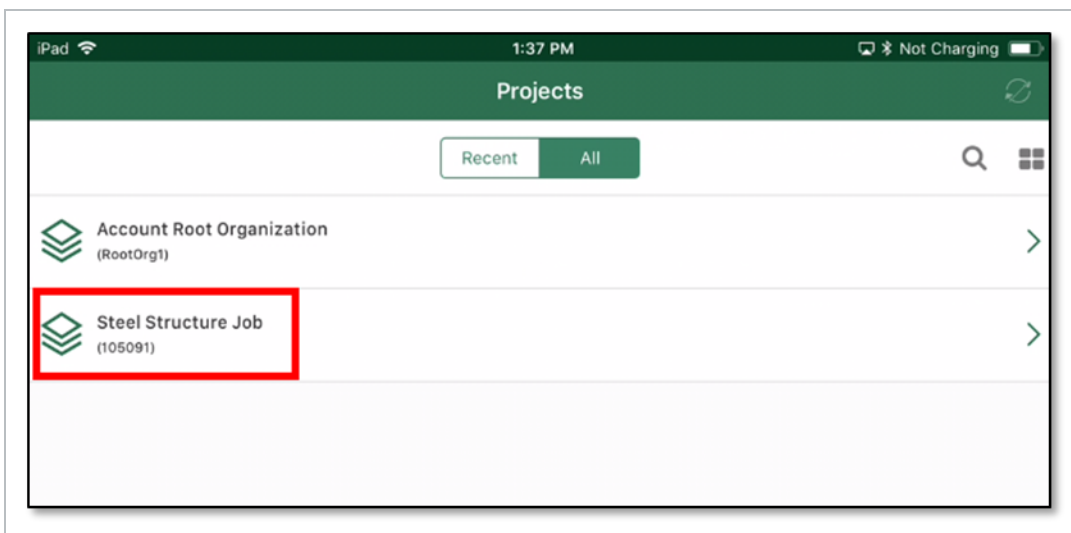
1. Open the Compliance mobile application by tapping the **InEight SQC** icon on your mobile device. and log in.
2. Log in and select Compliance if selection is shown (You may be directly taken to the Compliance projects screen).
3. The Projects screen is shown.

TIP

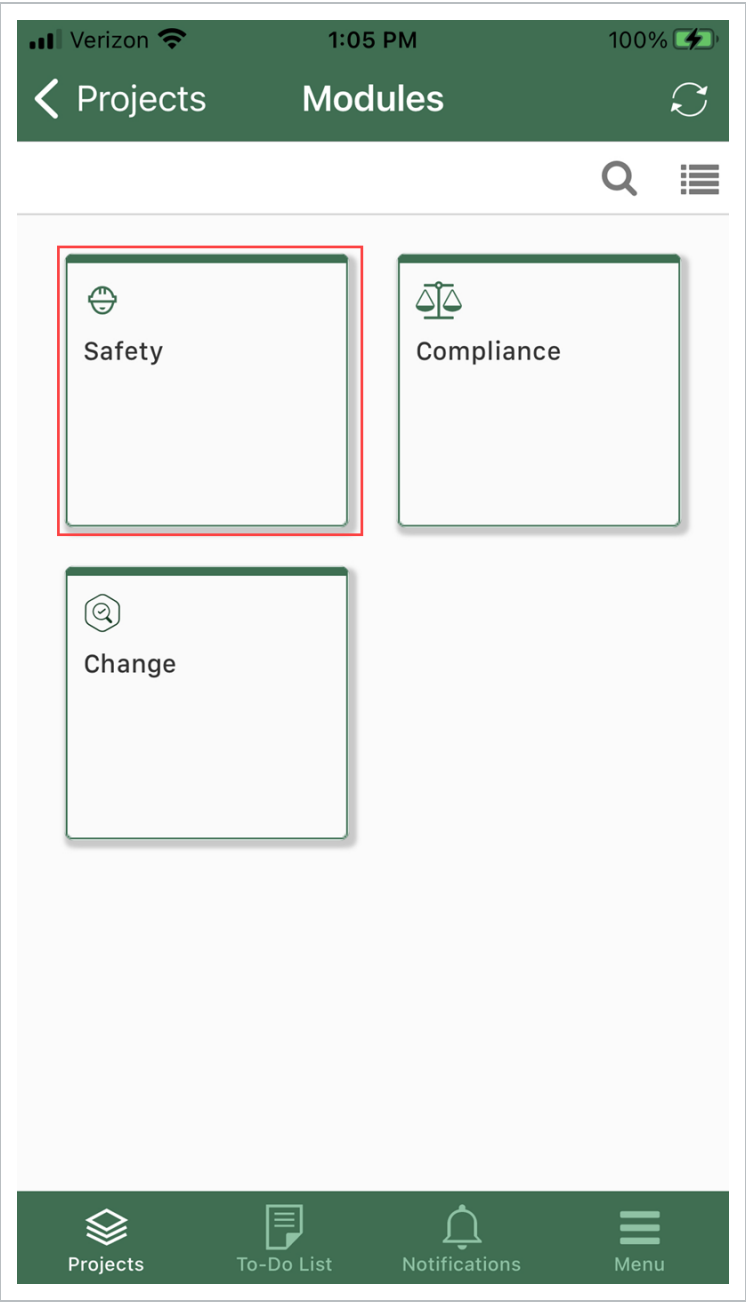
The mobile application saves your password for quicker log-in.

4. Open a project for which there is a report.

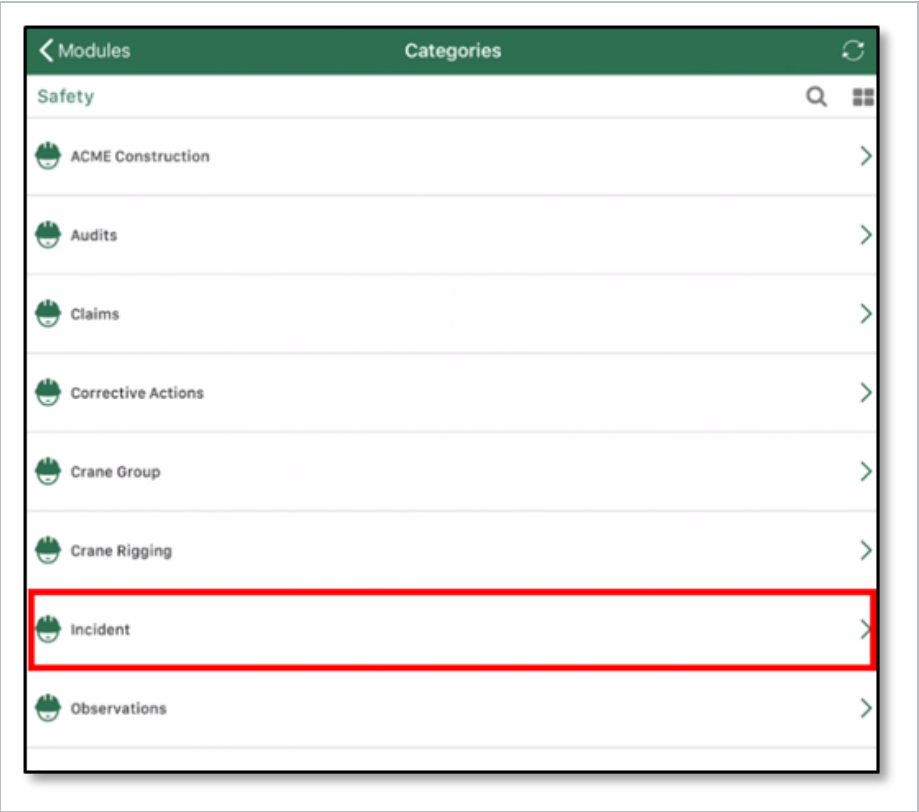
If your access allows, select the project **105091 – Steel Structure Job**



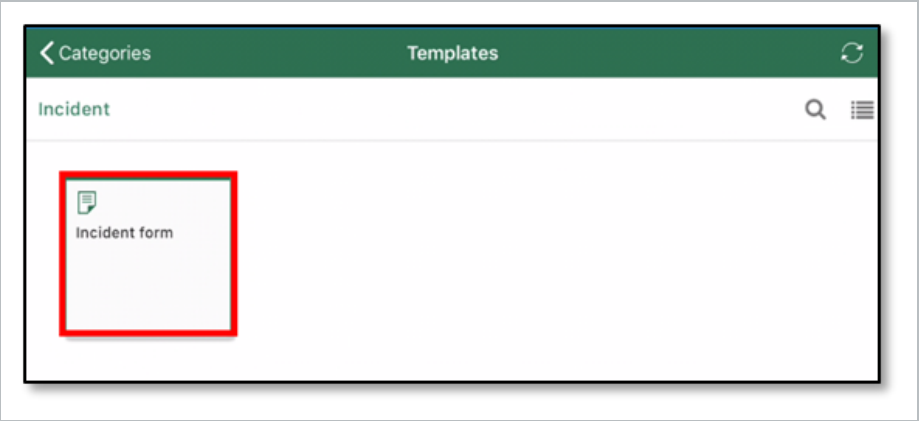
5. Select a module, in this case **Safety**.



6. Find and select a Safety category, in this case, **Incident**, from the Categories screen.



7. Select an event from the templates list, in this case, **Incident form**.



8. Fill in the form.

Incident form

Cancel Save

Incident Information

* Initial description of the incident
hurt leg when i fell on rocks
121 characters remaining

* Date of incident
May 14, 2019

Time the incident occurred
2:19 PM

Specific location the incident occurred
north side of site
132 characters remaining

Description of the incident
Carrying a load of trash when worker lost his footing and fell on rock bed.
3925 characters remaining

Was anyone injured during this incident?
☒ Yes
☐ No

Is the injured party internal or external to the project?
☒ Internal
☐ External

Name of the injured party
paul bernion

What time did the injured party start work on the day of the incident?
12:26 PM

Incident form

Cancel Save

Incident Information

Please add any pertinent photos

Attach photos

1 photo(s) attached

Incident Details

Incident classification
☒ First Aid
☐ Lost Time
☐ Restricted Duty
☐ Other Rec.
☐ Non-work related
☐ Near Miss
☐ Auto / Equipment
☐ Utility Strike
☐ Fatality

Did the injured party receive any kind of medical treatment?
☒ Yes
☐ No

What is the job type of the injured party?
Carpenter

What was the cause of the injury?
Fall - Same Level

9. Complete all fields as required. In this example, select **Send for manager review**.

Injured Party information (Confidential)

Address of injured party

2224 W Evergreen
Anytown, USA

3971 characters remaining

Gender of injured party

☒ Male

☐ Female

Date of birth

February 27, 1990

Date of hire

August 14, 2018

Send for manager review

6.3 COMPLETE A FORM OR TASK ON MOBILE

There are several ways to finish filling out a form or task depending on how it is set up by your administrator and what the next steps are.

6.3.1 Save a form or task

If you do not have enough time to complete a form or task, or not all information about the event is readily available, you can tap **Save** to save your work. You can then continue or close the form or task, and then come back later to complete and submit it.

Safety Task

Cancel

Save

SAFETY TASK INFORMATION

6.3.2 Assign a task

As part of filling out a task, you might have to assign it to someone else to complete some of it. To assign a task, tap the **Assign** button. If you want to start a new task immediately after assigning the current task, tap **Assign and start new task**.



6.3.3 Submit a form or task

After you have completed your event or task, tap the button to submit it. In this example, the button is labeled **Submit form**. This syncs with the Compliance web application for manager approval.

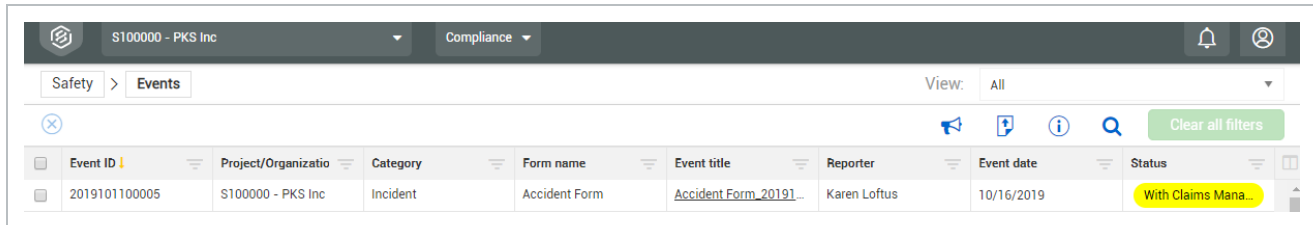
A screenshot of a mobile application interface for an 'Accident Form'. The status bar at the top shows 'VZW Wi-Fi', '3:14 PM', and '68%' battery. The app header is green with 'Accident Form', a location icon, and an info icon. Below the header are 'Cancel' and 'Save' buttons. A green section titled 'Accident Information' contains a dashed box with a camera icon and the text 'Attach photos'. Below this, it says '1 photo(s) attached'. At the bottom, a green button labeled 'Submit form' is highlighted with a red rectangle. Below the button is another green section titled 'CLOSURE OF INVESTIGATION' with an info icon, and a button that says 'Click here to start a workers comp claim report'.**TIP**

If you have not completed your event or task, you can tap **Save**, and it goes to the to-do list, where you can retrieve it when you are ready to complete it.

NOTE

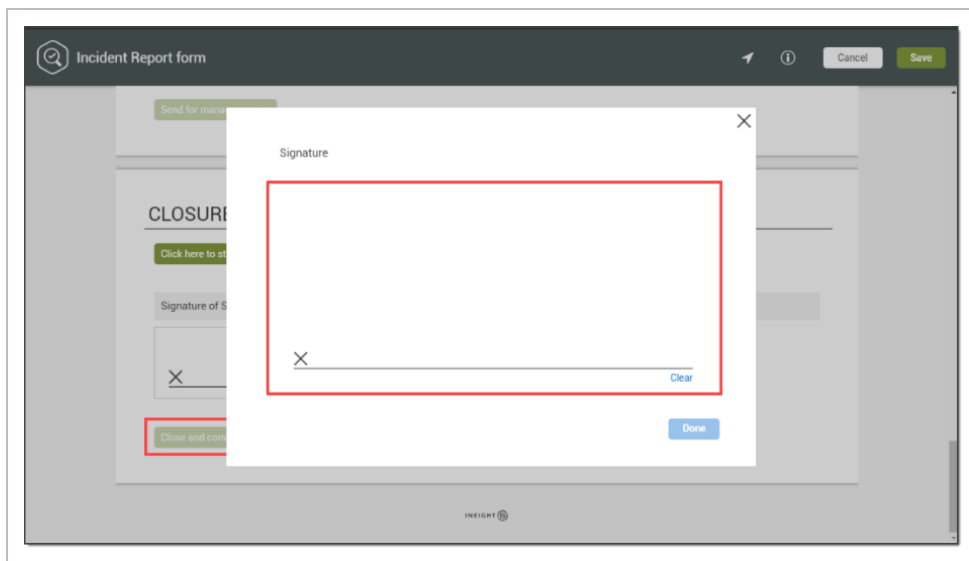
After you sync the event or task to the web, it is removed from your device.

For the event used in this example to be completed, open it in the Compliance web application under Safety > **Events**. In this example, the status for your event is **With Claims Manager**.



Event ID	Project/Organization	Category	Form name	Event title	Reporter	Event date	Status
2019101100005	S100000 - PKS Inc	Incident	Accident Form	Accident Form_20191...	Karen Loftus	10/16/2019	With Claims Mana...

The manager can now sign off on the event in the web application. Click the event title to open the event to the closure of investigation section. This is where the manager signs and taps on the Close and complete this incident button to complete the form.



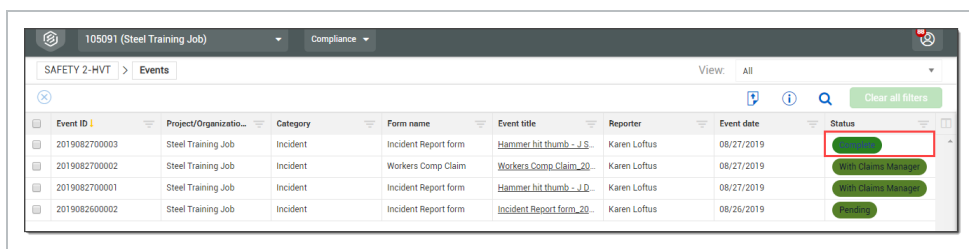
Incident Report form

Signature

CLEAR

Done

After the event is signed and completed, the status of the event on the Events page changes to Complete.



Event ID	Project/Organization	Category	Form name	Event title	Reporter	Event date	Status
2019082700003	Steel Training Job	Incident	Incident Report form	Hammer hit thumb - J.S.	Karen Loftus	08/27/2019	Complete
2019082700002	Steel Training Job	Incident	Workers Comp Claim	Workers Comp Claim_20	Karen Loftus	08/27/2019	With Claims Manager
2019082700001	Steel Training Job	Incident	Incident Report form	Hammer hit thumb - J.D.	Karen Loftus	08/27/2019	With Claims Manager
2019082600002	Steel Training Job	Incident	Incident Report form	Incident Report form_20	Karen Loftus	08/26/2019	Pending

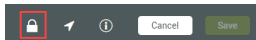
The following steps walk you through performing an event on a mobile device.

6.4 LOCKED EVENTS AND TASKS

When working through a task or event on a mobile device, a locking mechanism is in place to ensure your completion of the task or event. This means another individual cannot open your task or event as long they are synced to the mobile device and the list shows the item as locked.

Event ID	Project/Organization	Category	Form name	Event title	Reporter	Event date	Status
2019112700063	iSmart	iSmart_001	All_Questions_Oct_15	Testing nov 27	Krishna Prasad	11/27/2019	Pending
2019112700060	iSmart	iSmart_001	All_Questions_Oct_15	Testing for web lock	Krishna Prasad	11/27/2019	Complete
2019112700055	iSmart	iSmart_001	All_Questions_Oct_15	Testing for checking do list	Krishna Prasad	11/27/2019	Pending
2019112700047	iSmart	iSmart_001	All_Questions_Oct_15	Testing for email associated	Pradeep Kumar	11/27/2019	Complete

If the Event title of a locked item is tapped, the event opens, but will be unavailable for edits or saving as long as the Locked icon is shown.



NOTE

If the Information icon is selected, edit properties are also unavailable.

All_Questions_Oct_15

30311

QUESTIONS ANSWERED
7/7

Edit properties

Proj/org: iSmart

Category: iSmart_001

Event date: 11/27/2019

Status: Pending

Reporter: Krishna Prasad

Event title: Testing for checking do list

Date started:

Module: Quality

Version: 4

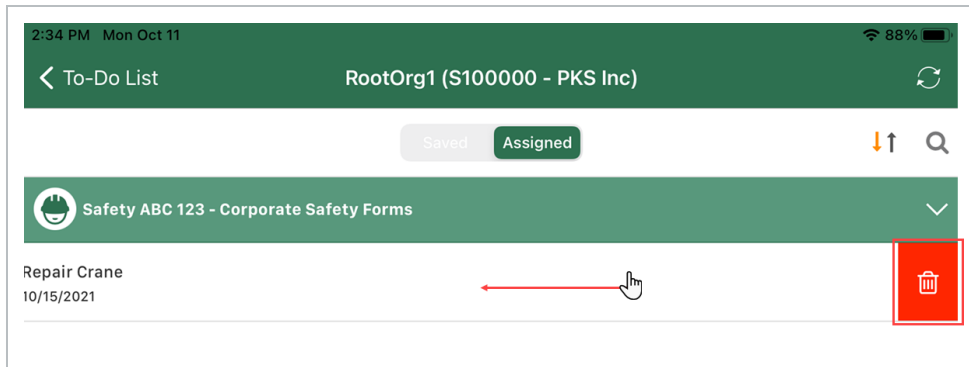
Attachments

Forms/Tasks

6.4.0.1 Unlock

If you prefer to complete a task on the web rather than on mobile, you can delete the task from your To-Do List.

To delete a task, go to To-Do List > **Assigned**. Swipe to the left on the task, and then tap the trash can icon that is shown to the right.

**NOTE**

When you remove a task from the To-Do List, you must be connected to the internet via Wi-Fi or cellular. If you remove when not connected, the task is removed but not unlocked on the web. In this case, you must resync when connected, and then remove again.

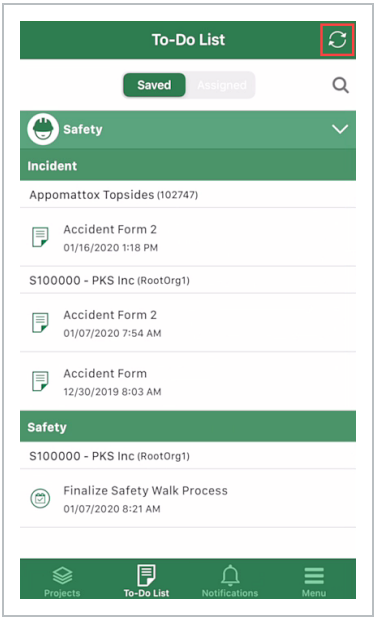
After you remove a task from the To-Do List, it is recommended that you not sync your device until the assigned task's status is changed from Scheduled to Pending in the web application. To update the status, you can start the task on the web or, if you have permission to edit properties, you can bulk update unlocked tasks.

NOTE

If the task status remains Scheduled the next time you sync, the task is locked and downloaded to your device.

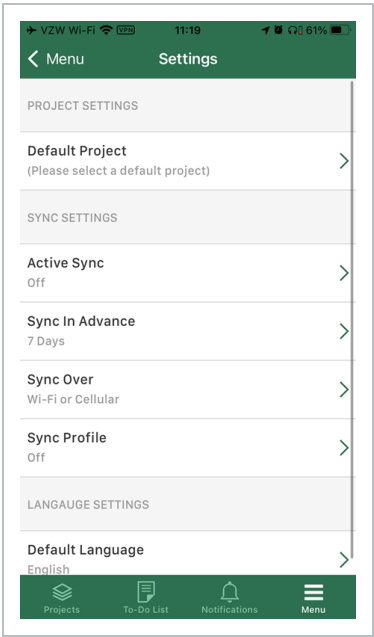
6.5 SYNC

Syncing automatically occurs when you are connected and use a button within the event/task. The **Sync** icon in the top right corner is used when you want to get more data from the Compliance web application to your device.



6.5.1 Sync Settings

Sync settings are located in the Menu > **Settings**.



6.5.1.1 Active Sync

If you enable Active Sync, data is synced when you open the application or a project. If Active Sync is off, the application waits 24 hours after each project sync before attempting to sync again. You can

manually sync at any time.

6.5.1.2 Sync in Advance

As events and tasks are assigned, they need to be available on mobile device days ahead of the due date so that they can be done on-time.

Sync In Advance lets you choose whether to sync items from the web to your mobile device one, two, or three weeks in the future from the current date to the due date or scheduled date.

6.5.1.3 Sync Over Wi-Fi or Cellular

In Settings > **Sync Over**, you can choose whether to allow syncing only over Wi-Fi or over Wi-Fi and cellular.

6.5.1.4 Sync Profile

The Sync Profile settings lets you choose whether to automatically download assigned events or tasks to your mobile device.

To enable automatic syncing, go to Settings > **Sync Profile**, and then turn on the toggles for events or tasks.

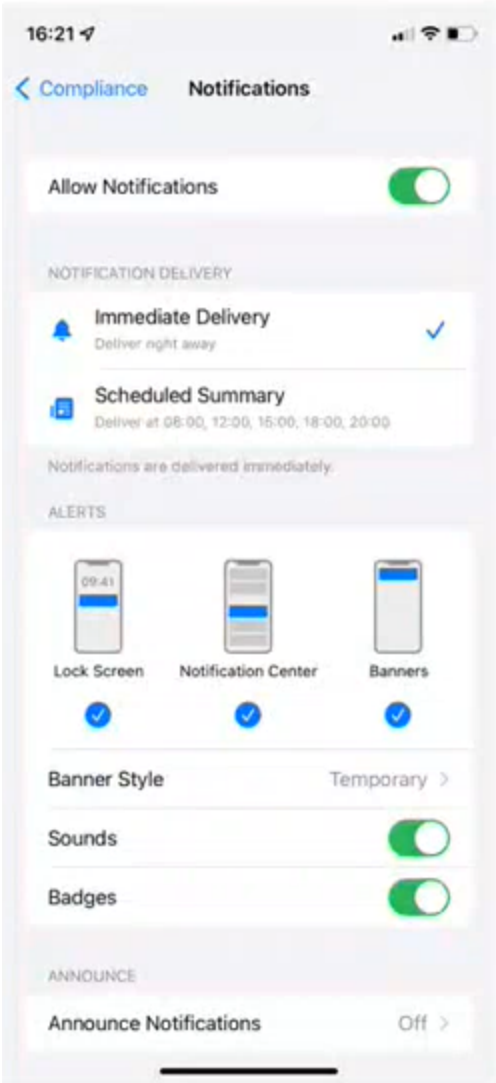
NOTE The sync profile settings are off by default.

If a sync toggle is off and you sync your device, work items are not downloaded to your device.

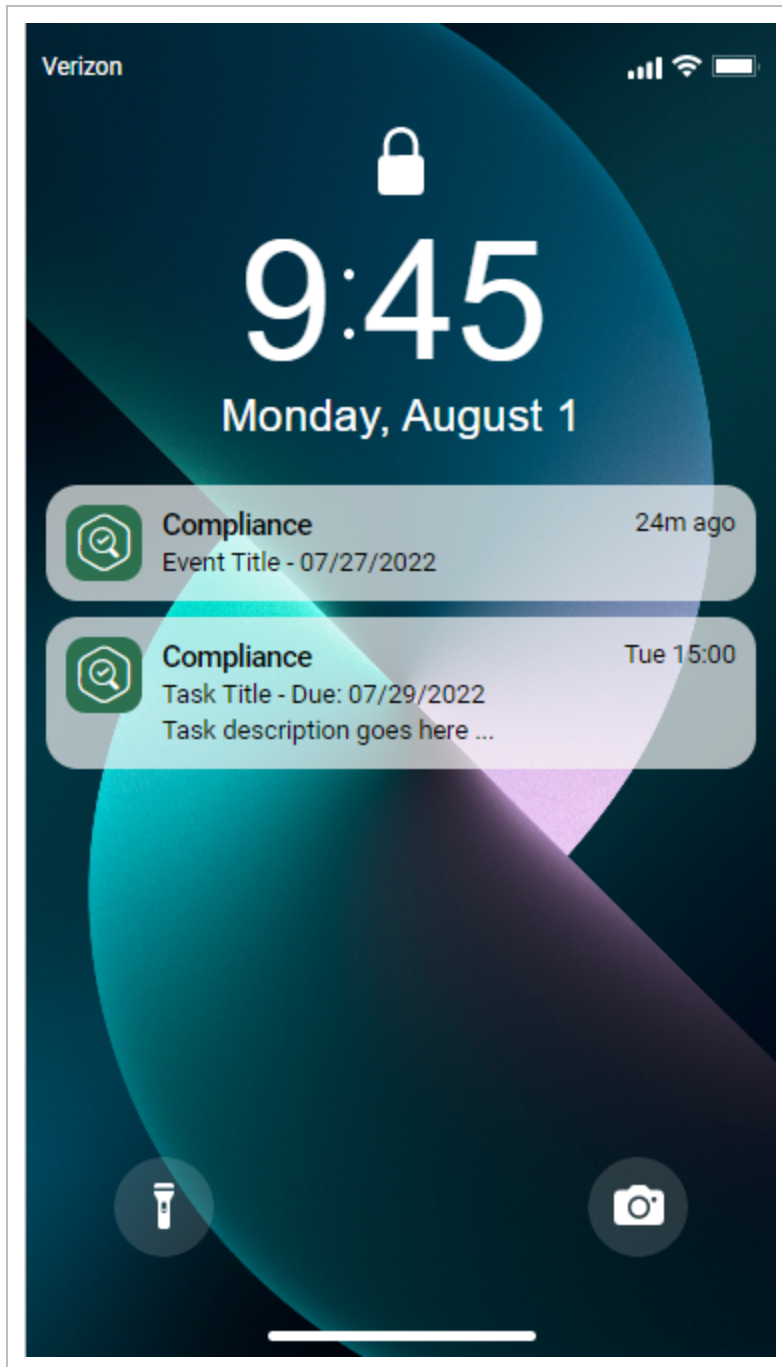
If you have assigned work items on your device and turn off one of the sync toggles, you are asked to confirm whether you want to remove the work items from your assignments and unlock them on the web.

6.6 PUSH NOTIFICATIONS

You can setup push notifications on your iOS mobile device to alert you of any updates of assigned events and tasks. Use the iOS notification settings to control notification alerts.



When an assigned item is set up, you receive a notification on your mobile device.



You can tap on the notification to launch the application automatically. If you are logged in, it takes you directly to the item in the To do list. You must be logged into the application to receive notifications.